TrackOne Reports Defined

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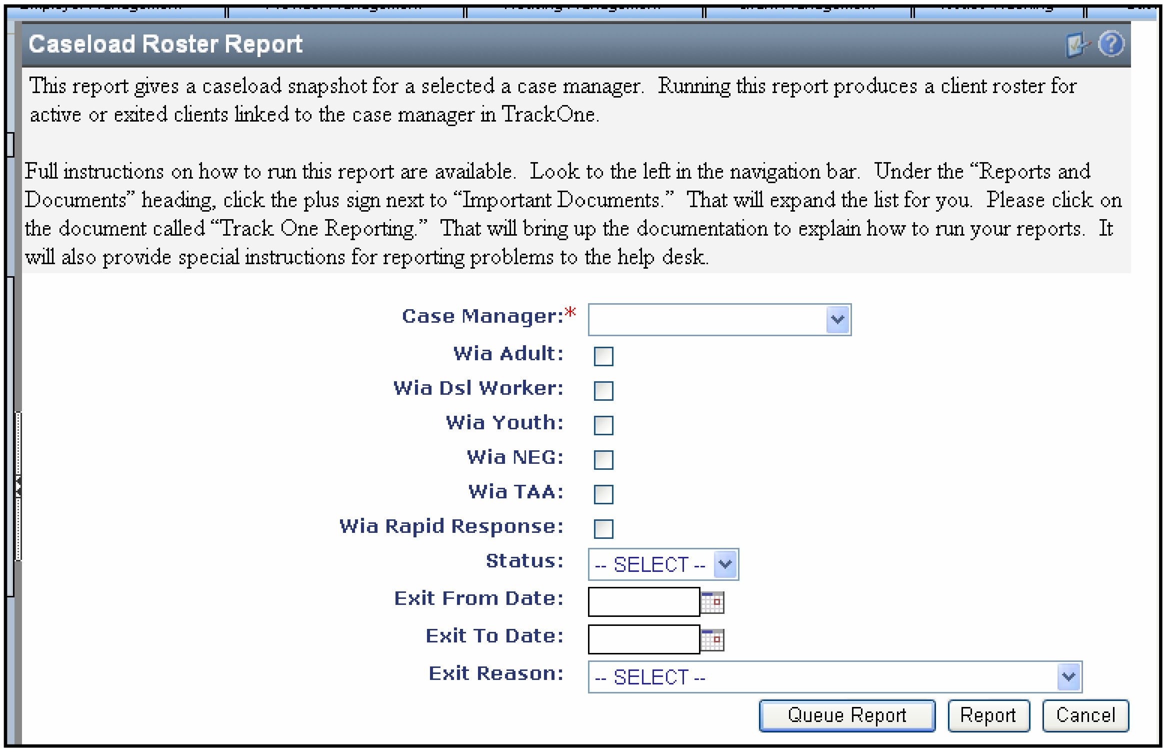
Caseload Reports

Caseload Roster Report



Uses: The purpose of this report is to provide a full picture of selected staff's caseload. It includes historic data and new clients added since July 1.

Using the parameters:

1. Use the Case Manager drop-down to select the specific client roster (i.e. which case manager's list do you want to see). This is based on the clients assigned to staff inside of TrackOne. It includes active and inactive assignments.

2. The next 6 selections represent program participation within the region. If you leave all boxes blank, you will run the report for all programs. If a single program is selected, then all clients enrolled in that program will appear on the report. If the client is also enrolled in other programs then they will also appear. If 2 or more programs are selected, then the roster will only return those clients with all programs.

   Here's an example. You have client John Doe in the WIA Adult program. Jane Jones is enrolled in WIA DSL Worker. Maria Sanchez is dual-enrolled in WIA Adult and WIA DSL Worker.

   You run the report and check the box for WIA Adult. John Doe and Maria Sanchez would show up on the report. If WIA DSL Worker is selected, then Jane Jones and Maria Sanchez will show up on the report. Conversely, if you checked both WIA Adult and WIA DSL worker, only Maria Sanchez would show up (and not John Doe or Jane Jones).

3. The next parameter is "Status." You can choose either Active or Exited. Active means the client does not have an official exit date. Exited means the client has an official exit date (90 days have pasted since the last service.) If you leave "Select" highlighted, you will get all clients, those still "Active" and those with an Exit date. This gives you more flexibility in fine-tuning your search.

4. If you choose "Exited" in the Status parameter, you will have to use the "Exit Data From" and "Exit Date To" fields. This defines the time period for the report. (For example, these fields would allow you to look at clients exited from 1/1/06 to 6/30/06.) In addition, if you choose "exited," you can specify exactly which exit "reason" you want to search. Note that some of the exit choices have asterisks next to the name. These reasons are "exclusions" meaning they are excluded from the performance calculations.

Output – Layout:

The parameters or "Report Selection Criteria" are always identified in the Report Header.

Caseload Roster Report

TrackOne

12/27/2006 2:23 PM

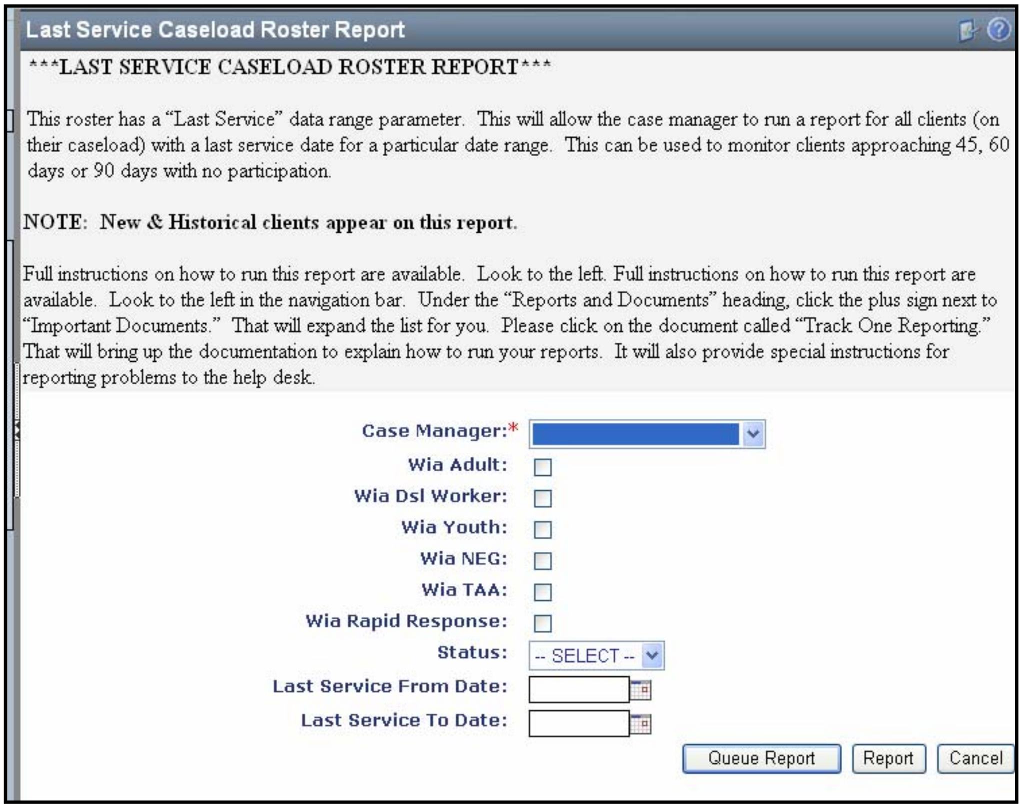
Report Selection Criteria

Case Manager: **Jeff Murphy** Adult: **Y** NEG: **N** Dsl Worker: **N** Exit From Date: **1/1/2006** Exit Reason: *

Status: * Youth: **N** TAA: **N** Rapid Response: **N** Exit To Date: **12/12/2006**

Counter	Region	Organization	Name	SocSecNo	Adult	Dsl Wrkr	Youth	NEG	TAA	RR	Enrl / First Service	Last Service	Official Exit Date	Official Exit Reason	Case Managers
1		Conversion Organization	GapTest, Joe	XXX-XX-1111	Y	N	N	N	N	N	11/04/2005	01/04/2006	07/04/2006	Soft Exit Applied - No Services for 90 Days	Jeff Murphy
2		Conversion Organization	Smith, Jamie	XXX-XX-1000	Y	N	N	N	N	N	11/04/2005	08/01/2006	08/01/2006	Soft Exit Applied - No Services for 90 Days	Jeff Murphy
3	01	WDS - East Chicago	DOE, AHMED I	XXX-XX-3969	Y	N	N	N	N	N	08/29/2005	09/01/2006	09/01/2006	Soft Exit Applied - No Services for 90 Days	Jeff Murphy Val Proctor
4	01	WDS - East Chicago	DOE, COZETTE L	XXX-XX-5833	Y	N	N	N	N	N	07/15/2003	10/20/2006			Jeff Murphy Val Proctor
5	01	WDS - East Chicago	DOE, DARCUS T	XXX-XX-4344	Y	N	N	N	N	N	12/05/2005	11/20/2006			Jeff Murphy Val Proctor
6	01	KVWorks - Valpo	DOE, GORAN	XXX-XX-9252	Y	N	N	N	N	N	04/08/2005	10/20/2006			Janet Crawford Jeff Murphy
7	01	WDS - East Chicago	DOE, JOSHICA	XXX-XX-9528	Y	N	N	N	N	N	11/08/2004	09/27/2006	09/27/2006	Soft Exit Applied - No Services for 90 Days	Jeff Murphy Val Proctor

Last Service Caseload Roster Report



Uses: This roster has a "Last Service" data range parameter. This will allow the case manager to run a report for all clients (on their caseload) with a last service date for a particular date range. This can be used to monitor clients approaching 45, 60 days or 90 days with no participation.

Using the parameters:

1. Use the Case Manager drop-down to select the specific client roster (i.e. which case manager's list do you want to see). This is based on the clients assigned to staff inside of TrackOne. It includes active and inactive assignments.

2. The next 6 selections represent program participation within the region. If you leave all boxes blank, you will run the report for all programs. If a single program is selected, then all clients enrolled in that program will appear on the report. If the client is also enrolled in other programs then they will also appear. If 2 or more programs are selected, then the roster will only return those clients with all programs.

   Here's an example. You have client John Doe in the WIA Adult program. Jane Jones is enrolled in WIA DSL Worker. Maria Sanchez is dual-enrolled in WIA Adult and WIA DSL Worker.

You run the report and check the box for WIA Adult. John Doe and Maria Sanchez would show up on the report. If WIA DSL Worker is selected, then Jane Jones and Maria Sanchez will show up on the report. Conversely, if you checked both WIA Adult and WIA DSL worker, only Maria Sanchez would show up (and not John Doe or Jane Jones).

3. The next parameter is "Status." You can choose either Active or Exited. Active means the client does not have an official exit date. Exited means the client has an official exit date (90 days have pasted since the last service.) If you leave "Select" highlighted, you will get all clients, those still "Active" and those with an Exit date. This gives you more flexibility in fine-tuning your search.

4. The "Last Service From Date" and the "Last Service To Date" is the date range for the last service (which extends an exit).

5. Click the "Report" button to generate the report. The report will display in a separate window on your screen.

Output – Layout:

The parameters or "Report Selection Criteria" are always identified in the Report Header. "Last Service" date is a column along with the "Plan Exit Date" and the "Plan Exit Reason." These last two fields are located on the "Exit Information" screen in TrackOne. That screen should only be completed when the last scheduled service is delivered and the client will likely be exited in 90 days due to no participation.

Last Service Caseload Roster Report

TrackOne

12/27/2006 2:27 PM

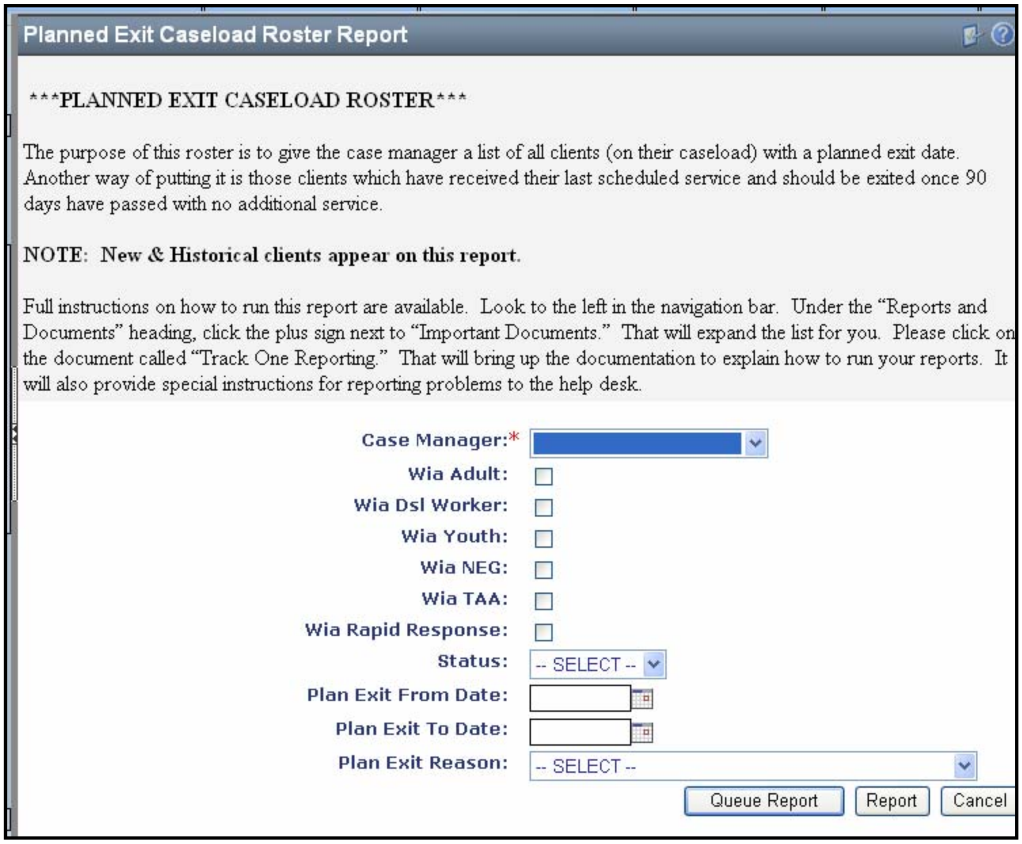
Report Selection Criteria

Case Manager: **Jeff Murphy** Adult: **Y** NEG: **N** Dsl Worker: **N** Last Service From Date: **10/1/2006**

Status: **Active** Youth: **N** TAA: **N** Rapid Response: **N** Last Service To Date: **12/21/2006**

Counter	Region	Organization	Name	SocSecNo	Adult	Dsl Wrkr	Youth	NEG	TAA	RR	Enrl / First Service	Last Service	Plan Exit Date	Plan Exit Reason	Case Managers
1	01	WDS - East Chicago	DOE, COZETTE L	XXX-XX-5833	Y	N	N	N	N	N	07/15/2003	10/20/2006			Jeff Murphy Val Proctor
2	01	WDS - East Chicago	DOE, DARCUS T	XXX-XX-4344	Y	N	N	N	N	N	12/05/2005	11/20/2006			Jeff Murphy Val Proctor
3	01	KVWorks - Valpo	DOE, GORAN	XXX-XX-9252	Y	N	N	N	N	N	04/08/2005	10/20/2006			Janet Crawford Jeff Murphy
4	05	Interlocal Association - Hendricks	Mannings, Peyton	XXX-XX-2222	Y	N	N	N	N	N	10/13/2006	10/13/2006	10/13/2006	Entered Unsubsidized Employment	Jeff Murphy

Planned Exit Caseload Roster Report


Planned Exit Caseload Roster Report

PLANNED EXIT CASELOAD ROSTER

The purpose of this roster is to give the case manager a list of all clients (on their caseload) with a planned exit date. Another way of putting it is those clients which have received their last scheduled service and should be exited once 90 days have passed with no additional service.

NOTE: New & Historical clients appear on this report.

Full instructions on how to run this report are available. Look to the left in the navigation bar. Under the "Reports and Documents" heading, click the plus sign next to "Important Documents." That will expand the list for you. Please click on the document called "Track One Reporting." That will bring up the documentation to explain how to run your reports. It will also provide special instructions for reporting problems to the help desk.

Case Manager:*
Wia Adult:
Wia Dsl Worker:
Wia Youth:
Wia NEG:
Wia TAA:
Wia Rapid Response:
Status: -- SELECT --
Plan Exit From Date:
Plan Exit To Date:
Plan Exit Reason: -- SELECT --
Queue Report | Report | Cancel

Uses: The purpose of this roster is to give the case manager a list of all clients (on their caseload) with a planned exit date. Another way of putting it is those clients which have received their last scheduled service and should be exited once 90 days have passed with no additional service. The plan exit date and the plan exit reason are entered on the "Exit Information" screen in TrackOne.

Using the parameters:

1. Use the Case Manager drop-down to select the specific client roster (i.e. which case manager's list do you want to see). This is based on the clients assigned to staff inside of TrackOne. It includes active and inactive assignments.

2. The next 6 selections represent program participation within the region. If you leave all boxes blank, you will run the report for all programs. If a single program is selected, then all clients enrolled in that program will appear on the report. If the client is also enrolled in other programs then they will also appear. If 2 or more programs are selected, then the roster will only return those clients with all programs.

   Here's an example. You have client John Doe in the WIA Adult program. Jane Jones is enrolled in WIA DSL Worker. Maria Sanchez is dual-enrolled in WIA Adult and WIA DSL Worker.

You run the report and check the box for WIA Adult. John Doe and Maria Sanchez would show up on the report. If WIA DSL Worker is selected, then Jane Jones and Maria Sanchez will show up on the report. Conversely, if you checked both WIA Adult and WIA DSL worker, only Maria Sanchez would show up (and not John Doe or Jane Jones).

3. The next parameter is “Status.” You can choose either Active or Exited. Active means the client does not have an official exit date. Exited means the client has an official exit date (90 days have pasted since the last service.) If you leave “Select” highlighted, you will get all clients, those still “Active” and those with an Exit date. This gives you more flexibility in fine-tuning your search.

4. The “Planned Exit From Date” and the “Planned Exit To Date” is the date range for the last scheduled service. (This is the Planned Exit Date on the Exit Information screen in TrackOne. This defines the time period for the report. (For example, these fields would allow you to look at clients with a planned exit date from 8/1/06 to 8/31/06. This could be run in Sept. 2006, before the 90 days have passed. This will give a case manager an idea of how many exits should occur in real-time.)

5. Planned Exit Reason is the next field. This allows the user to filter out a particular “planned exit reason” such as “entered unsubsidized employment.” Not making a selection (choosing “--Select—“) will return all exit reasons.

6. Click the “Report” button to generate the report. The report will display in a separate window on your screen.

Output – Layout:

The parameters or “Report Selection Criteria” are always identified in the Report Header. “Last Service” date is a column along with the “Plan Exit Date” and the “Plan Exit Reason.” These last two fields are located on the “Exit Information” screen in TrackOne. That screen should only be completed when the last scheduled service is delivered and the client will likely be exited in 90 days due to no participation.

Planned Exit Caseload Roster Report

TrackOne

12/27/2006 2:32 PM

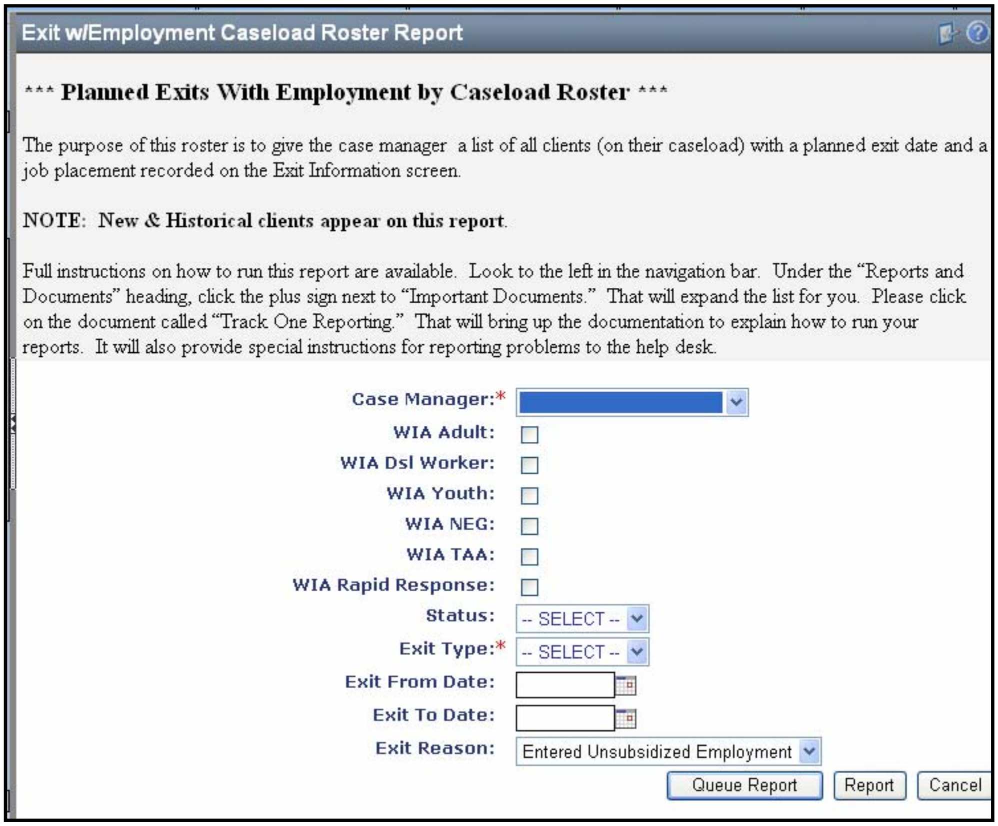
Report Selection Criteria

Case Manager: **Jeff Murphy** Adult: **N** NEG: **N** Dsl Worker: **N** Planned Exit From Date: **8/1/2006** Planned Exit Reason:

Status: * Youth: **N** TAA: **N** Rapid Response: **N** Planned Exit To Date: **1/1/2007** *

Counter	Region	Organization	Name	SocSecNo	Adult	Dsl Wrkr	Youth	NEG	TAA	RR	Enrl / First Service	Last Service	Plan Exit Date	Plan Exit Reason	Case Managers
1		Conversion Organization	Smith, Jamie	XXX-XX-1000	Y	N	N	N	N	N	11/04/2005	08/01/2006	08/01/2006	Entered Unsubsidized Employment	Jeff Murphy
2	05	Interlocal Association - Hendricks	Mannings, Peyton	XXX-XX-2222	Y	N	N	N	N	N	10/13/2006	10/13/2006	10/13/2006	Entered Unsubsidized Employment	Jeff Murphy

Exit w/ Employment Caseload Roster Report



Uses: The purpose of this roster is to give the case manager a list of all clients (on their caseload) with a planned exit date ***and*** a job placement recorded on the Exit Information screen. The report can be run using an "actual" exit date range or a "Planned" exit date range.

Using the parameters:

1. Use the Case Manager drop-down to select the specific client roster (i.e. which case manager's list do you want to see). This is based on the clients assigned to staff inside of TrackOne. It includes active and inactive assignments.

2. The next 6 selections represent program participation within the region. If you leave all boxes blank, you will run the report for all programs. If a single program is selected, then all clients enrolled in that program will appear on the report. If the client is also enrolled in other programs then they will also appear. If 2 or more programs are selected, then the roster will only return those clients with all programs.

   Here's an example. You have client John Doe in the WIA Adult program. Jane Jones is enrolled in WIA DSL Worker. Maria Sanchez is dual-enrolled in WIA Adult and WIA DSL Worker.

You run the report and check the box for WIA Adult. John Doe and Maria Sanchez would show up on the report. If WIA DSL Worker is selected, then Jane Jones and Maria Sanchez will show up on the report. Conversely, if you checked both WIA Adult and WIA DSL worker, only Maria Sanchez would show up (and not John Doe or Jane Jones).

3. The next parameter is "Status." You can choose either Active or Exited. Active means the client does not have an official exit date. Exited means the client has an official exit date (90 days have pasted since the last service.) If you leave "Select" highlighted, you will get all clients, those still "Active" and those with an Exit date. This gives you more flexibility in fine-tuning your search.

4. The "Exit Type" parameter allows the user to use either an "Actual" exit date range or a "planned" exit date range.

5. The "Exit From Date" and the "Exit To Date" is the date range for either the planned exit date appearing on the Exit information screen or the official Exit date (90 days have pasted since the last service.)

6. Planned Exit Reason is the next field. This allows the user to filter out a particular "planned exit reason" such as "entered unsubsidized employment." Not making a selection (choosing "--Select—") will return all exit reasons.

7. Click the "Report" button to generate the report. The report will display in a separate window on your screen.

Output – Layout:

The parameters or "Report Selection Criteria" are always identified in the Report Header. "Last Service" date is a column along with the "Plan Exit Date." It also has the "Pre Wage" and "Post Wage" & "Employer" based on the work history record attached to the Application and the Exit Information Screen respectively. The report footer gives a total count of "Total employed at Planned Exit." The average pre & post wages and average wage gain are also included in the footer.

Exit w/ Employment Caseload Roster Report

TrackOne 12/27/2006 2:41 PM

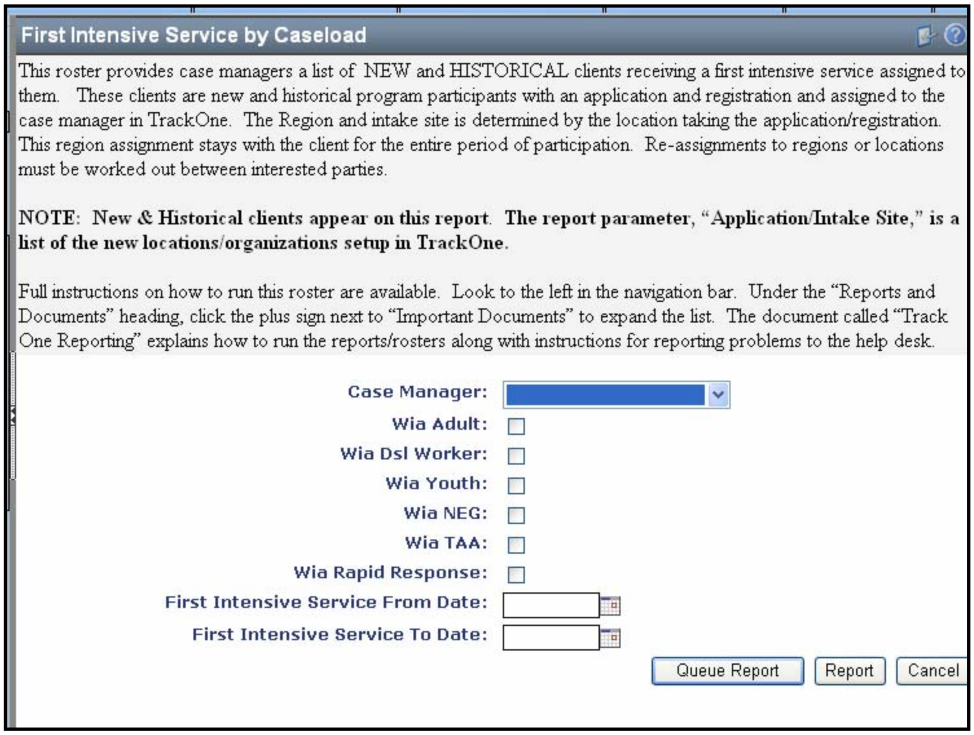
Report Selection Criteria

Case Manager: **Jeff Murphy**	Adult: **N**	NEG: **N**	Dsl Worker: **N**	Planned Exit From Date **7/1/2006**	Planned Exit Reason
Status: *	Youth: **N**	TAA: **N**	Rapid Response: **N**	Planned Exit To Date **12/21/2006**	**Entered Unsubsidized**

Counter	Region	Organization	Name	SocSecNo	Adult	Dsl Wrkr	Youth	NEG	TAA	RR	Enrl / First Service	Last Service	Planned Exit Date	Pre Wage	Post Wage	Employer	Case Managers
1		Conversion Organization	Smith, Jamie	XXX-XX-1000	Y	N	N	N	N	N	11/04/2005	08/01/2006	08/01/2006				Jeff Murphy
2	03	Job Works - Allen WorkOne	DOE, BEN P	XXX-XX-8396	N	Y	N	N	N	N	02/22/2006	07/21/2006	07/21/2006	$17.00	$17.50	Diversified Marketing	Jeff Murphy Van Rockefeller
3	05	Interlocal Association - Hendricks	Mannings, Peyton	XXX-XX-2222	Y	N	N	N	N	N	10/13/2006	10/13/2006	10/13/2006	$44.50			Jeff Murphy

		Average Pre-Wage:	Average Post-Wage:	Average Gain:
Total employed at Planned Exit Date:	1	$30.75	$17.50	-$13.25

First Intensive Service by Caseload


First Intensive Service by Caseload

This roster provides case managers a list of NEW and HISTORICAL clients receiving a first intensive service assigned to them. These clients are new and historical program participants with an application and registration and assigned to the case manager in TrackOne. The Region and intake site is determined by the location taking the application/registration. This region assignment stays with the client for the entire period of participation. Re-assignments to regions or locations must be worked out between interested parties.

NOTE: New & Historical clients appear on this report. The report parameter, "Application/Intake Site," is a list of the new locations/organizations setup in TrackOne.

Full instructions on how to run this roster are available. Look to the left in the navigation bar. Under the "Reports and Documents" heading, click the plus sign next to "Important Documents" to expand the list. The document called "Track One Reporting" explains how to run the reports/rosters along with instructions for reporting problems to the help desk.

Case Manager:
Wia Adult:
Wia Dsl Worker:
Wia Youth:
Wia NEG:
Wia TAA:
Wia Rapid Response:
First Intensive Service From Date:
First Intensive Service To Date:

Queue Report | Report | Cancel

Uses: This roster provides case managers a list of NEW and HISTORICAL clients receiving a first intensive service assigned to them.

Using the parameters:

1. Use the Case Manager drop-down to select the specific client roster (i.e. which case manager's list do you want to see). This is based on the clients assigned to staff inside of TrackOne. It includes active and inactive assignments.

2. The next 6 selections represent program participation within the region. If you leave all boxes blank, you will run the report for all programs. If a single program is selected, then all clients enrolled in that program will appear on the report. If the client is also enrolled in other programs then they will also appear. If 2 or more programs are selected, then the roster will only return those clients with all programs.

   Here's an example. You have client John Doe in the WIA Adult program. Jane Jones is enrolled in WIA DSL Worker. Maria Sanchez is dual-enrolled in WIA Adult and WIA DSL Worker.

   You run the report and check the box for WIA Adult. John Doe and Maria Sanchez would show up on the report. If WIA DSL Worker is selected, then Jane Jones and Maria Sanchez will show up on the report. Conversely, if you checked both WIA Adult and WIA DSL worker, only Maria Sanchez would show up (and not John Doe or Jane Jones).

3. The "First Intensive Service From Date" and the "First Intensive Service To Date" is the date range for the first intensive service (which moves the client into the WIA Performance calculations).

4. Click the "Report" button to generate the report. The report will display in a separate window on your screen.

Output – Layout:

The parameters or "Report Selection Criteria" are always identified in the Report Header. The "Enrl / First Service" and the "Last Service Date" are columns on the report. The Region and "App/Reg Site" columns are determined by the location taking the application/registration. This region assignment stays with the client for the entire period of participation. Re-assignments to regions or locations must be worked out between interested parties.

First Intensive Service by Caseload

TrackOne 12/27/2006 2:43 PM

Report Selection Criteria

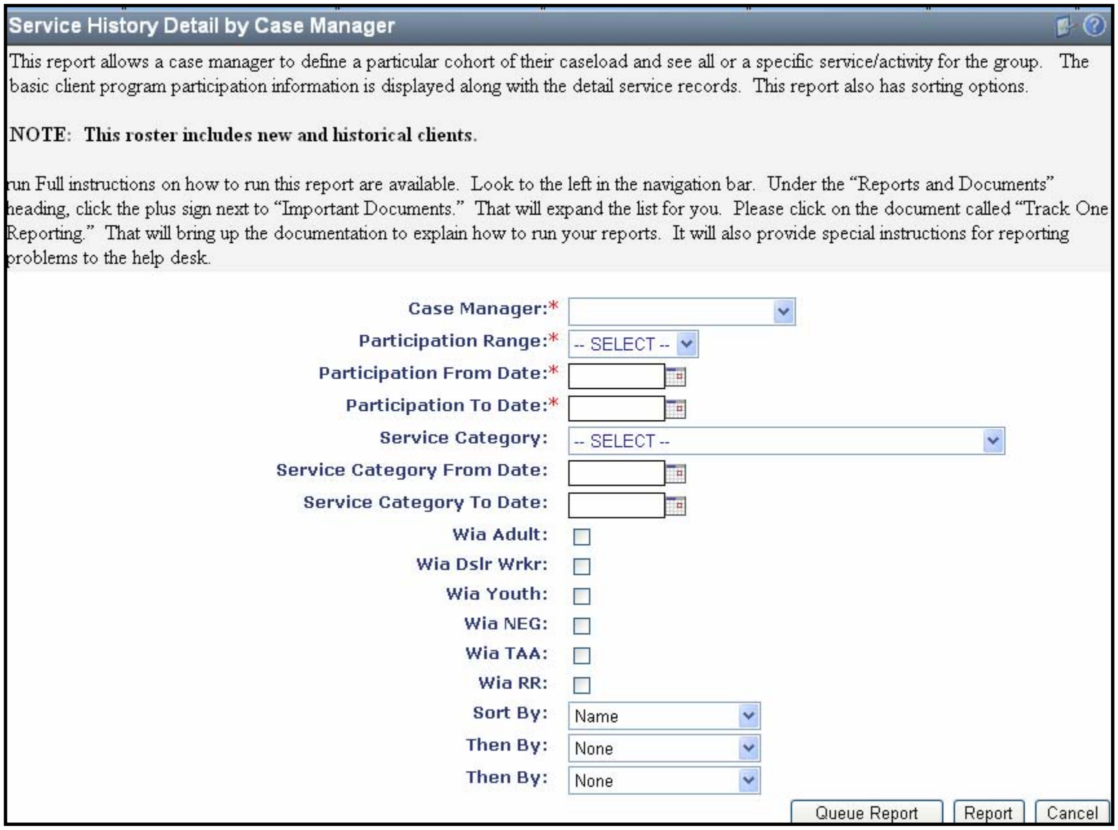
Case Manager: **Jeff Murphy** Adult: **N** NEG: **N** 1st Intensive Service From Date: **7/1/2006**

Youth: **N** TAA: **N** 1st Intensive Service To Date: **12/21/2006**

Dsl Worker: **N** Rapid Response: **N**

Counter	Region	App/Reg Site	Name	SocSecNo	Adult	Dsl Wrkr	Youth	NEG	TAA	RR	Enrl / First Service	Last Service Date	Case Managers
1			disabledYouth, Test	XXX-XX-5454	N	N	N	N	N	N	11/15/2006	11/15/2006	Jeff Murphy
2	05	Interlocal Association - Hendricks	Mannings, Peyton	XXX-XX-2222	Y	N	N	N	N	N	10/13/2006	10/13/2006	Jeff Murphy
3	12	Indianapolis Private Industry Council	Smith, John	XXX-XX-3333	Y	N	N	N	N	N	09/20/2006	05/26/2007	Jeff Murphy
4			Stumper, Joe	XXX-XX-9987	N	N	N	N	N	N	12/05/2006	12/05/2006	Jeff Murphy
5			TestMasterUSer, New Client Vinc-Gree	XXX-XX-6666	N	N	N	N	N	N	11/16/2006	11/16/2006	Jeff Murphy
6	12	Indianapolis Private Industry Council	TestNew, NewTest	XXX-XX-5555	N	N	N	N	N	N	12/20/2006	12/20/2006	Jeff Murphy
7			DOE, BRIANNA L	XXX-XX-2719	N	N	N	N	N	N	09/09/2006	10/09/2006	Crystal Johnson Jeff Murphy Shelby Hicks Steve Nance

Service History Detail by Case Manager



Uses: This report allows a case manager to define a particular cohort of their caseload and see all or a specific service/activity for the group. The basic client program participation information is displayed along with the detail service records. This report also has sorting options.

Using the parameters:

1. Use the Case Manager drop-down to select the specific client roster (i.e. which case manager's list do you want to see). This is based on the clients assigned to staff inside of TrackOne. It includes active and inactive assignments.

2. The "Participation Range:" parameter allows the user to define whether the cohort (target group) is "Active, Exited or New Starts." The "Active" parameter will return any client which was "active" at least 1 day during the date range. The "Exited" parameter returns any client which has an "official Exit date during the date range. The "New Starts" parameter returns any client with a 1st service date which falls within the date range.

3. The "Participation From Date" and "Participation To Date" is the date range for the selected participation type above. If "Active" is selected then the date range is for any client which was active at least 1 day during the range. If "Exited" is selected then the date range is for the official exit date.

4. The "Service Category" allows the user to select a specific service category and only those service records for the client will appear on the report. If "Select" is left as the choice then all service records for the client will be displayed on the report. This parameter can be used to return only the occupational skills training services or the supportive services.

5. The "Service Category From Date" and the "Service Category To Date" is the date range for the selected service category. This parameter can be very useful as it can filter the Occupational Skills Training services which were active at least 1 day during the months of Oct. to Nov.

6. The next 6 selections represent program participation within the region. If you leave all boxes blank, you will run the report for all programs. If a single program is selected, then all clients enrolled in that program will appear on the report. If the client is also enrolled in other programs then they will also appear. If 2 or more programs are selected, then the roster will only return those clients with all programs.

   Here's an example. You have client John Doe in the WIA Adult program. Jane Jones is enrolled in WIA DSL Worker. Maria Sanchez is dual-enrolled in WIA Adult and WIA DSL Worker.

   You run the report and check the box for WIA Adult. John Doe and Maria Sanchez would show up on the report. If WIA DSL Worker is selected, then Jane Jones and Maria Sanchez will show up on the report. Conversely, if you checked both WIA Adult and WIA DSL worker, only Maria Sanchez would show up (and not John Doe or Jane Jones).

7. The next three parameters allow the user to select how the results will be sorted. The defaults can be left as is if there is no preference.

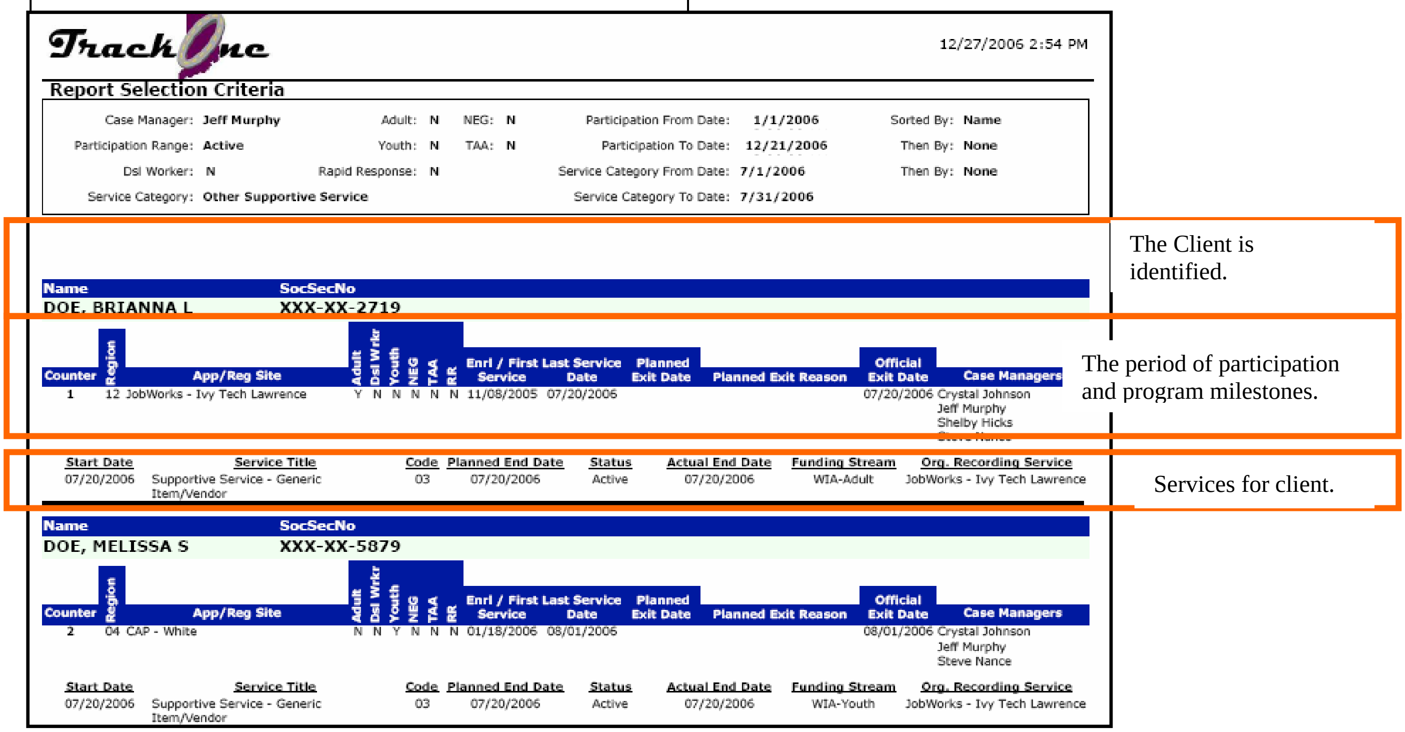
8. Click the "Report" button to generate the report. The report will display in a separate window on your screen.

Output – Layout:

The parameters or "Report Selection Criteria" are always identified in the Report Header. The Service History Detail has three sections for each client. The 1st is the row which identifies the client by name and SSN. The 2nd row defines the period of participation, the program involvement and the major milestone dates. The 3rd is the services detail section where each service is listed along with dates, status, funding stream and organization recording the service.

Note: Historical service records ***do*** appear on the report; however they ***will not*** have a Service title. They ***will*** have the old code. New services, since go-live, will have a descriptive title in the "Service Title" column.

Service History Detail by Case Manager



TrackOne 12/27/2006 2:54 PM

Report Selection Criteria

Case Manager: **Jeff Murphy**	Adult: **N**	NEG: **N**	Participation From Date: **1/1/2006**	Sorted By: **Name**
Participation Range: **Active**	Youth: **N**	TAA: **N**	Participation To Date: **12/21/2006**	Then By: **None**
Dsl Worker: **N**	Rapid Response: **N**		Service Category From Date: **7/1/2006**	Then By: **None**
Service Category: **Other Supportive Service**			Service Category To Date: **7/31/2006**	

Name	SocSecNo
DOE, BRIANNA L	XXX-XX-2719

The Client is identified.

Counter	Region	App/Reg Site	Adult	Dsl Wrkr	Youth	NEG	TAA	RR	Enrl / First Service	Last Service Date	Planned Exit Date	Planned Exit Reason	Official Exit Date	Case Managers
1	12	JobWorks - Ivy Tech Lawrence	Y	N	N	N	N	N	11/08/2005	07/20/2006			07/20/2006	Crystal Johnson Jeff Murphy Shelby Hicks

The period of participation and program milestones.

Start Date	Service Title	Code	Planned End Date	Status	Actual End Date	Funding Stream	Org. Recording Service
07/20/2006	Supportive Service - Generic Item/Vendor	03	07/20/2006	Active	07/20/2006	WIA-Adult	JobWorks - Ivy Tech Lawrence

Services for client.

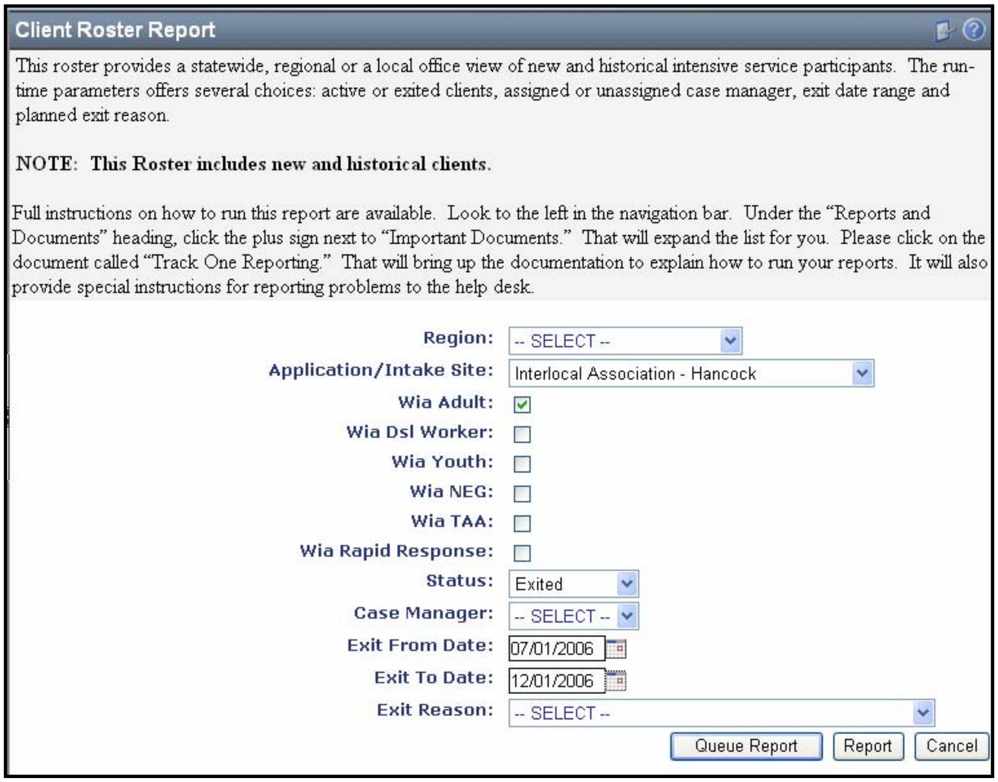
Name	SocSecNo
DOE, MELISSA S	XXX-XX-5879

Counter	Region	App/Reg Site	Adult	Dsl Wrkr	Youth	NEG	TAA	RR	Enrl / First Service	Last Service Date	Planned Exit Date	Planned Exit Reason	Official Exit Date	Case Managers
2	04	CAP - White	N	N	Y	N	N	N	01/18/2006	08/01/2006			08/01/2006	Crystal Johnson Jeff Murphy Steve Nance

Start Date	Service Title	Code	Planned End Date	Status	Actual End Date	Funding Stream	Org. Recording Service
07/20/2006	Supportive Service - Generic Item/Vendor	03	07/20/2006	Active	07/20/2006	WIA-Youth	JobWorks - Ivy Tech Lawrence

Region/Site Reports

Client Roster Report


Client Roster Report

This roster provides a statewide, regional or a local office view of new and historical intensive service participants. The run-time parameters offers several choices: active or exited clients, assigned or unassigned case manager, exit date range and planned exit reason.

NOTE: This Roster includes new and historical clients.

Full instructions on how to run this report are available. Look to the left in the navigation bar. Under the "Reports and Documents" heading, click the plus sign next to "Important Documents." That will expand the list for you. Please click on the document called "Track One Reporting." That will bring up the documentation to explain how to run your reports. It will also provide special instructions for reporting problems to the help desk.

Region: -- SELECT --
Application/Intake Site: Interlocal Association - Hancock
Wia Adult:
Wia Dsl Worker:
Wia Youth:
Wia NEG:
Wia TAA:
Wia Rapid Response:
Status: Exited
Case Manager: -- SELECT --
Exit From Date: 07/01/2006
Exit To Date: 12/01/2006
Exit Reason: -- SELECT --

Queue Report | Report | Cancel

Uses: This roster provides a statewide, regional or a local office view of new and historical intensive service participants. The run-time parameters offers several choices: active or exited clients, assigned or unassigned case manager, exit date range and planned exit reason. The run-time parameters allow for a statewide, regional or a local office view of new and historical clients.

Using the parameters:

1. Decide if you need the report for a region or for a Site:
   a. If you need the report run for a region, begin by selecting the Region from the drop-down list. If the field is left set to "Select," the report will run for ALL regions.
   b. If you want a report for a local service provider, you will use the "Application/Intake Site" pick list. This drop-down is a list of all ***existing*** locations in TrackOne.
   c. **Caution:** Selecting from both the Region and Site could result in a blank report if the site does not fall within the selected region.

2. The next 6 selections represent program participation within the region. If you leave all boxes blank, you will run the report for all programs. If a single program is selected, then all clients enrolled in that program will appear on the report. If the client is also enrolled in other programs then they will also appear. If 2 or more programs are selected, then the roster will only return those clients with all programs.

Here's an example. You have client John Doe in the WIA Adult program. Jane Jones is enrolled in WIA DSL Worker. Maria Sanchez is dual-enrolled in WIA Adult and WIA DSL Worker.

You run the report and check the box for WIA Adult. John Doe and Maria Sanchez would show up on the report. If WIA DSL Worker is selected, then Jane Jones and Maria Sanchez will show up on the report. Conversely, if you checked both WIA Adult and WIA DSL worker, only Maria Sanchez would show up (and not John Doe or Jane Jones).

3. The next parameter is "Status." You can choose either Active or Exited. Active means the client does not have an official exit date. Exited means the client has an official exit date (90 days have passed since the last service.) If you leave "Select" highlighted, you will get all clients, those still "Active" and those with an Exit date. This gives you more flexibility in fine-tuning your search.

4. The Case Manager drop-down is available to allow you to search for clients who are assigned or unassigned in the system. As an example, you could run "Active" in the status drop-down and "unassigned" in the case manager drop-down to see the active clients who came over in the conversion that still need a case manager to be assigned.

5. If you choose "Exited" in the Status parameter, you will have to use the "Exit Data From" and "Exit Date To" fields. This defines the time period for the report. (For example, these fields would allow you to look at clients exited from 1/1/06 to 6/30/06.) In addition, if you choose "exited," you can specify exactly which exit "reason" you want to search. This will further refine/narrow your data search.

6. Note that some of the exit choices have asterisks next to the name. These reasons are "exclusions" meaning they are excluded from the performance calculations.

7. Click the "Report" button to generate the report. The report will display in a separate window on your screen.

Output – Layout:

The parameters or "Report Selection Criteria" are always identified in the Report Header.

Client Roster Report

TrackOne

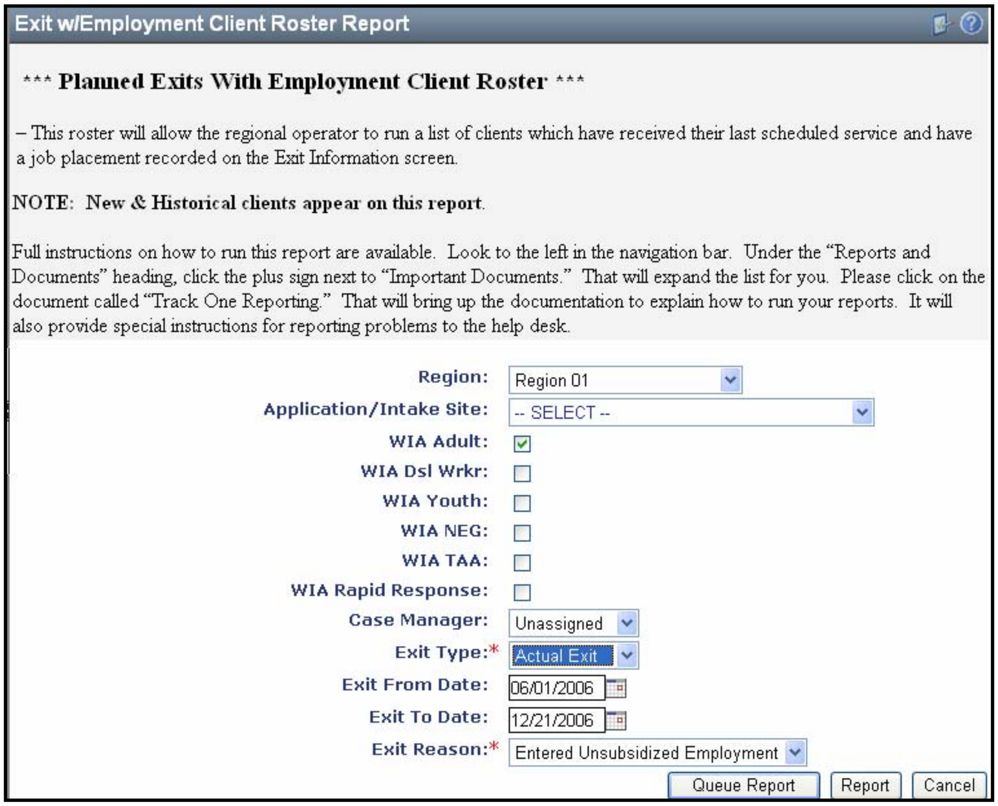
12/27/2006 3:23 PM

Report Selection Criteria

Region:	*	Adult:	Y	NEG:	N	Dsl Worker:	N	Exit From Date:	7/1/2006	Exit Reason:
Case Manager:	*	Youth:	N	TAA:	N	Rapid Response:	N	Exit To Date:	12/1/2006	*
App/Intake Site:	Interlocal Association -	Status:	Exited							

Counter	Region	Organization	Name	SocSecNo	Adult	Dsl Wrkr	Youth	NEG	TAA	RR	Enrl / First Service	Last Service	Official Exit Date	Official Exit Reason	Case Managers
1	05	Interlocal Association - Hancock	DOE, David J	XXX-XX-4535	Y	Y	N	N	N	N	07/28/2006	08/24/2006	08/24/2006	Soft Exit Applied - No Services for 90 Days	Megan Brinkman
2	05	Interlocal Association - Hancock	DOE, EVIE J	XXX-XX-1213	Y	N	N	N	N	N	05/01/2006	07/17/2006	07/17/2006	Soft Exit Applied - No Services for 90 Days	Megan Brinkman
3	05	Interlocal Association - Hancock	DOE, HEATHER E	XXX-XX-8517	Y	N	N	N	N	N	08/08/2005	07/05/2006	07/05/2006	Soft Exit Applied - No Services for 90 Days	Megan Brinkman
4	05	Interlocal Association - Hancock	DOE, JACKIE J	XXX-XX-4788	Y	N	N	N	N	N	05/01/2006	08/02/2006	08/02/2006	Soft Exit Applied - No Services for 90 Days	Megan Brinkman
5	05	Interlocal Association - Hancock	DOE, Judy A	XXX-XX-5897	Y	N	N	N	N	N	08/25/2006	08/25/2006	08/25/2006	Soft Exit Applied - No Services for 90 Days	Megan Brinkman
6	05	Interlocal Association - Hancock	DOE, JULIA A	XXX-XX-0102	Y	N	N	N	N	N	05/04/2006	08/22/2006	08/22/2006	Soft Exit Applied - No Services for 90 Days	Megan Brinkman

Exit w/ Employment Client Roster Report



Uses: This roster will allow the regional operator to run a list of clients which have received their last scheduled service ***and*** have a job placement recorded on the Exit Information screen. The run-time parameters allow for a statewide, regional or a local office view of new and historical clients.

Using the parameters:

1. Decide if you need the report for a region or for a Site:
    a. If you need the report run for a region, begin by selecting the Region from the drop-down list. If the field is left set to "Select," the report will run for ALL regions.
    b. If you want a report for a local service provider, you will use the "Application/Intake Site" pick list. This drop-down is a list of all ***existing*** locations in TrackOne.
    c. **Caution:** Selecting from both the Region and Site could result in a blank report if the site does not fall within the selected region.

2. The next 6 selections represent program participation within the region. If you leave all boxes blank, you will run the report for all programs. If a single program is selected, then all clients enrolled in that program will appear on the report. If the client is also enrolled in other programs then they will also appear. If 2 or more programs are selected, then the roster will only return those clients with all programs.

Here's an example. You have client John Doe in the WIA Adult program. Jane Jones is enrolled in WIA DSL Worker. Maria Sanchez is dual-enrolled in WIA Adult and WIA DSL Worker.

You run the report and check the box for WIA Adult. John Doe and Maria Sanchez would show up on the report. If WIA DSL Worker is selected, then Jane Jones and Maria Sanchez will show up on the report. Conversely, if you checked both WIA Adult and WIA DSL worker, only Maria Sanchez would show up (and not John Doe or Jane Jones).

3. The Case Manager drop-down is available to allow you to search for clients who are assigned or unassigned in the system. As an example, you could run "Active" in the status drop-down and "unassigned" in the case manager drop-down to see the active clients who came over in the conversion that still need a case manager to be assigned.

4. The "Exit Type" parameter allows the user to use either an "Actual" exit date range or a "planned" exit date range.

5. The "Exit From Date" and the "Exit To Date" is the date range for either the planned exit date appearing on the Exit information screen or the official Exit date (90 days have passed since the last service.)

6. Planned Exit Reason is the next field. This allows the user to filter out a particular "planned exit reason" such as "entered unsubsidized employment." Not making a selection (choosing "--Select—") will return all exit reasons.

7. Click the "Report" button to generate the report. The report will display in a separate window on your screen.

Output – Layout:

The parameters or "Report Selection Criteria" are always identified in the Report Header. "Last Service" date is a column along with the "Plan Exit Date." It also has the "Pre Wage" and "Post Wage" & "Employer" based on the work history record attached to the Application and the Exit Information Screen respectively. The report footer gives a total count of "Total employed at Planned Exit." The average pre & post wages and average wage gain are also included in the footer.

Exit w/ Employment client Roster Report

TrackOne 12/27/2006 3:28 PM

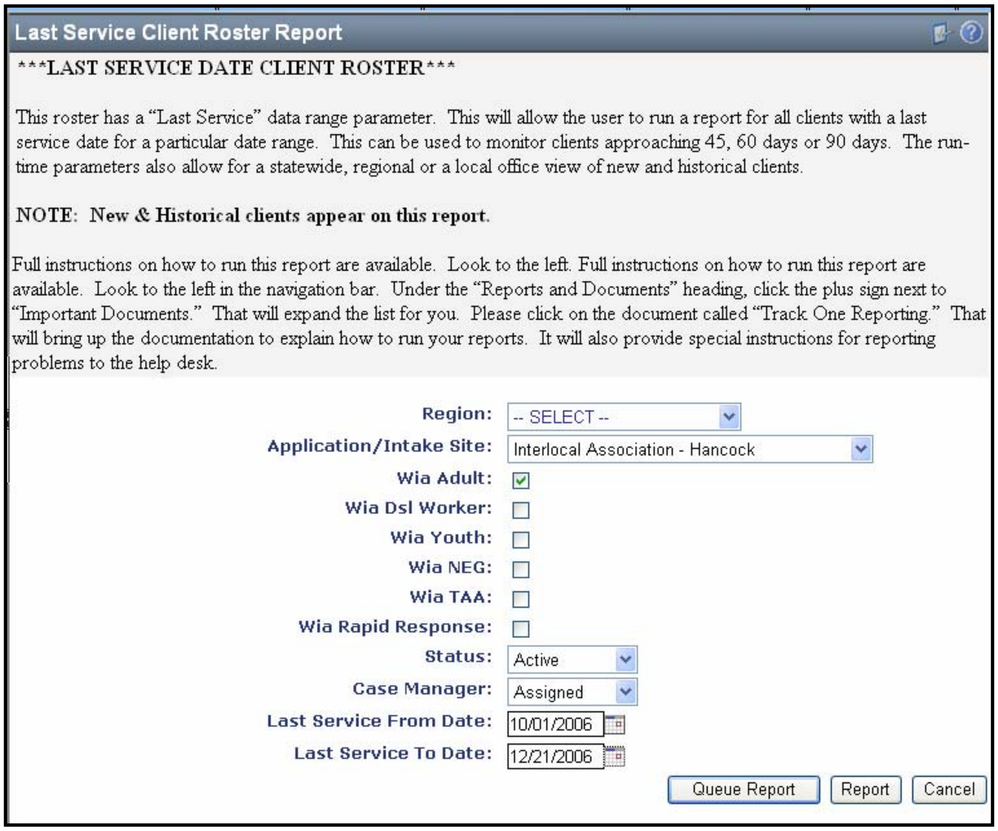
Report Selection Criteria

Region: 01	Adult: **Y**	NEG: **N**	Dsl Worker: **N**	Actual Exit From Date	**6/1/2006**
Case Manager: **Unassigned**	Youth: **N**	TAA: **N**	Rapid Response: **N**	Actual Exit To Date	**12/21/2006**
App/Intake Site: *				Actual Exit Reason	**Entered Unsubsidized Employment**

Counter	Region	Organization	Name	SocSecNo	Adult	Dsl Wrkr	Youth	NEG	TAA	RR	Enrl / First Service	Last Service	Actual Exit Date	Pre Wage	Post Wage	Employer	Case Managers
1	01	KVWorks - Portage	DOE, ANDREA A	XXX-XX-6172	Y	N	N	N	N	N	07/22/2005	06/11/2006	06/11/2006		$5.15	AMERICUS CNTRY FMLY REST	
2	01	KVWorks - Portage	DOE, JILL L	XXX-XX-7762	Y	N	N	N	N	N	06/15/2005	06/02/2006	06/02/2006				
3	01	KVWorks - Portage	DOE, JUDY	XXX-XX-2455	Y	N	N	N	N	N	02/10/2005	06/14/2006	06/14/2006		$8.75	M AND R TRUCKING	
4	01	KVWorks - Portage	DOE, MARY A	XXX-XX-6752	Y	N	N	N	N	N	12/13/2005	06/14/2006	06/14/2006		$16.00	SCHNEIDER NATIONAL	
5	01	KVWorks - Portage	DOE, ROBERTO	XXX-XX-7633	Y	N	N	N	N	N	09/06/2005	06/02/2006	06/02/2006		$10.50	WABASH TECHNOLOG IES	
6	01	KVWorks - Portage	DOE, TAMELA E	XXX-XX-8369	Y	N	N	N	N	N	01/25/2006	06/08/2006	06/08/2006		$8.00	THE WATERS OF DUNELAND	
7	01	KVWorks - Michigan City	DOE, WILLIE C	XXX-XX-4517	Y	N	N	N	N	N	09/08/2005	06/01/2006	06/01/2006		$9.50	MIDWEST WHEELER	

Total employed at Actual Exit Date:	6	Average Pre-Wage: NaN	Average Post-Wage: $9.65	Average Gain: NaN

Last Service Client Roster Report


Last Service Client Roster Report

LAST SERVICE DATE CLIENT ROSTER

This roster has a "Last Service" data range parameter. This will allow the user to run a report for all clients with a last service date for a particular date range. This can be used to monitor clients approaching 45, 60 days or 90 days. The run-time parameters also allow for a statewide, regional or a local office view of new and historical clients.

NOTE: New & Historical clients appear on this report.

Full instructions on how to run this report are available. Look to the left. Full instructions on how to run this report are available. Look to the left in the navigation bar. Under the "Reports and Documents" heading, click the plus sign next to "Important Documents." That will expand the list for you. Please click on the document called "Track One Reporting." That will bring up the documentation to explain how to run your reports. It will also provide special instructions for reporting problems to the help desk.

Region: -- SELECT --
Application/Intake Site: Interlocal Association - Hancock
Wia Adult:
Wia Dsl Worker:
Wia Youth:
Wia NEG:
Wia TAA:
Wia Rapid Response:
Status: Active
Case Manager: Assigned
Last Service From Date: 10/01/2006
Last Service To Date: 12/21/2006
Queue Report | Report | Cancel

Uses: This roster has a "Last Service" data range parameter. This will allow the user to run a report for all clients with a last service date for a particular date range. This can be used to monitor clients approaching 45, 60 days or 90 days. The run-time parameters allow for a statewide, regional or a local office view of new and historical clients.

Using the parameters:

1. Decide if you need the report for a region or for a Site:
   a. If you need the report run for a region, begin by selecting the Region from the drop-down list. If the field is left set to "Select," the report will run for ALL regions.
   b. If you want a report for a local service provider, you will use the "Application/Intake Site" pick list. This drop-down is a list of all ***existing*** locations in TrackOne.
   c. **Caution:** Selecting from both the Region and Site could result in a blank report if the site does not fall within the selected region.

2. The next 6 selections represent program participation within the region. If you leave all boxes blank, you will run the report for all programs. If a single program is selected, then all clients enrolled in that program will appear on the report. If the client is also enrolled in other programs then they will also appear. If 2 or more programs are selected, then the roster will only return those clients with all programs.

Here's an example. You have client John Doe in the WIA Adult program. Jane Jones is enrolled in WIA DSL Worker. Maria Sanchez is dual-enrolled in WIA Adult and WIA DSL Worker.

You run the report and check the box for WIA Adult. John Doe and Maria Sanchez would show up on the report. If WIA DSL Worker is selected, then Jane Jones and Maria Sanchez will show up on the report. Conversely, if you checked both WIA Adult and WIA DSL worker, only Maria Sanchez would show up (and not John Doe or Jane Jones).

3. The next parameter is "Status." You can choose either Active or Exited. Active means the client does not have an official exit date. Exited means the client has an official exit date (90 days have passed since the last service.) If you leave "Select" highlighted, you will get all clients, those still "Active" and those with an Exit date. This gives you more flexibility in fine-tuning your search.

4. The Case Manager drop-down is available to allow you to search for clients who are assigned or unassigned in the system. As an example, you could run "Active" in the status drop-down and "unassigned" in the case manager drop-down to see the active clients who came over in the conversion that still need a case manager to be assigned.

5. The "Last Service From Date" and the "Last Service To Date" is the date range for the last service (which extends an exit).

6. Click the "Report" button to generate the report. The report will display in a separate window on your screen.

Output – Layout:

The parameters or "Report Selection Criteria" are always identified in the Report Header

Last Service Client Roster Report

TrackOne

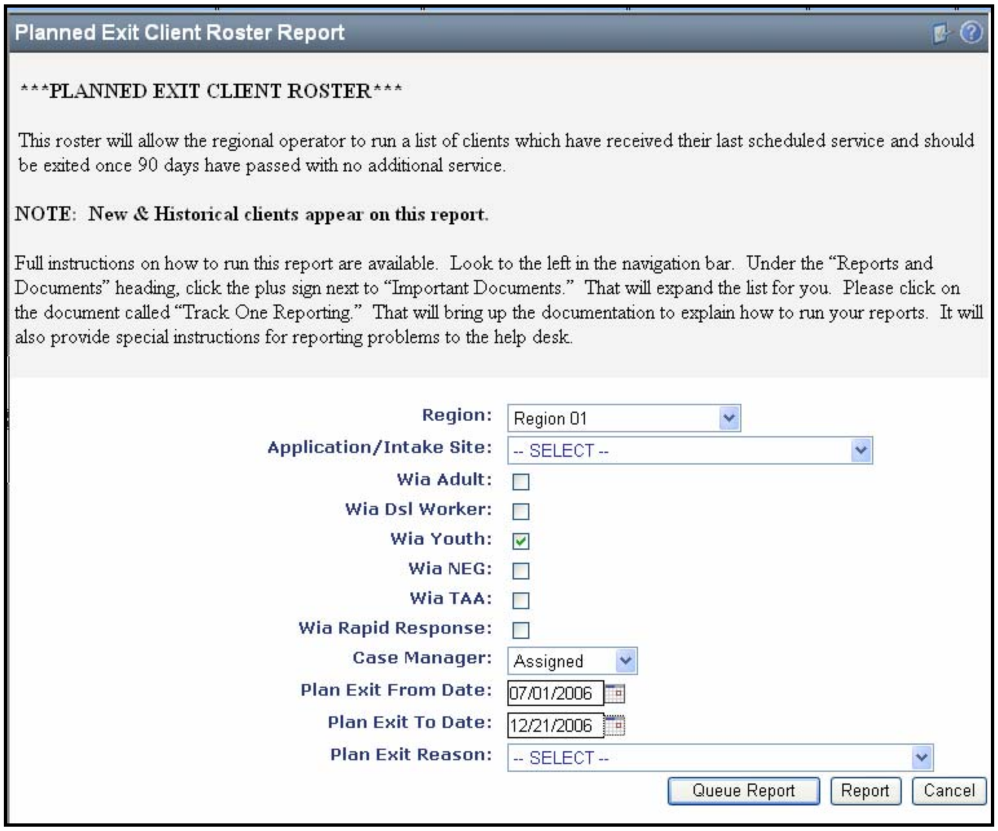
12/27/2006 3:39 PM

Report Selection Criteria

Region: *	Adult: **Y**	NEG: **N**	Dsl Worker: **N**	Last Service From Date: **10/1/2006**	
Case Manager: **Assigned**	Youth: **N**	TAA: **N**	Rapid Response: **N**	Last Service To Date: **12/21/2006**	
App/Intake Site: **Interlocal Association -**				Status: **Active**	

Counter	Region	Organization	Name	SocSecNo	Adult	Dsl Wrkr	Youth	NEG	TAA	RR	Enrl / First Service	Last Service	Plan Exit Date	Plan Exit Reason	Case Managers
1	05	Interlocal Association - Hancock	Baker, John	XXX-XX-1234	Y	N	N	N	N	N	11/02/2006	11/17/2006			Kevin Gibbs
2	05	Interlocal Association - Hancock	Johnson, Dana L	XXX-XX-2332	Y	N	N	N	N	N	10/04/2006	10/20/2006			Bonnie Brown Dawn Pettys Jeremy Riley Katina Smith Rick Sullivan Ron Hutcheson
3	05	Interlocal Association - Hancock	Johnson, Dana L	XXX-XX-2332	Y	N	N	N	N	N	10/04/2006	10/20/2006			Bonnie Brown Dawn Pettys Jeremy Riley Katina Smith Rick Sullivan Ron Hutcheson

Planned Exit Client Roster Report



Planned Exit Client Roster Report

PLANNED EXIT CLIENT ROSTER

This roster will allow the regional operator to run a list of clients which have received their last scheduled service and should be exited once 90 days have passed with no additional service.

NOTE: **New & Historical clients appear on this report.**

Full instructions on how to run this report are available. Look to the left in the navigation bar. Under the "Reports and Documents" heading, click the plus sign next to "Important Documents." That will expand the list for you. Please click on the document called "Track One Reporting." That will bring up the documentation to explain how to run your reports. It will also provide special instructions for reporting problems to the help desk.

Region: Region 01
Application/Intake Site: -- SELECT --
Wia Adult:
Wia Dsl Worker:
Wia Youth: ☑
Wia NEG:
Wia TAA:
Wia Rapid Response:
Case Manager: Assigned
Plan Exit From Date: 07/01/2006
Plan Exit To Date: 12/21/2006
Plan Exit Reason: -- SELECT --

Queue Report | Report | Cancel

Uses: This roster will allow the regional operator to run a list of clients which have received their last scheduled service ***and*** should be exited once 90 days have passed with no additional service. The run-time parameters allow for a statewide, regional or a local office view of new and historical clients.

Using the parameters:

1. Decide if you need the report for a region or for a Site:
   a. If you need the report run for a region, begin by selecting the Region from the drop-down list. If the field is left set to "Select," the report will run for ALL regions.
   b. If you want a report for a local service provider, you will use the "Application/Intake Site" pick list. This drop-down is a list of all ***existing*** locations in TrackOne.
   c. **Caution:** Selecting from both the Region and Site could result in a blank report if the site does not fall within the selected region.

2. The next 6 selections represent program participation within the region. If you leave all boxes blank, you will run the report for all programs. If a single program is selected, then all clients enrolled in that program will appear on the report. If the client is also enrolled in other programs then they will also appear. If 2 or more programs are selected, then the roster will only return those clients with all programs.

Here's an example. You have client John Doe in the WIA Adult program. Jane Jones is enrolled in WIA DSL Worker. Maria Sanchez is dual-enrolled in WIA Adult and WIA DSL Worker.

You run the report and check the box for WIA Adult. John Doe and Maria Sanchez would show up on the report. If WIA DSL Worker is selected, then Jane Jones and Maria Sanchez will show up on the report. Conversely, if you checked both WIA Adult and WIA DSL worker, only Maria Sanchez would show up (and not John Doe or Jane Jones).

3. The Case Manager drop-down is available to allow you to search for clients who are assigned or unassigned in the system. As an example, you could run "Active" in the status drop-down and "unassigned" in the case manager drop-down to see the active clients who came over in the conversion that still need a case manager to be assigned.

4. The "Planned Exit From Date" and the "Planned Exit To Date" is the date range for the last scheduled service. (This is the Planned Exit Date on the Exit Information screen in TrackOne. This defines the time period for the report. (For example, these fields would allow you to look at clients with a planned exit date from 8/1/06 to 8/31/06. This could be run in Sept. 2006, before the 90 days have passed. This will give a case manager an idea of how many exits should occur in real-time.)

5. Planned Exit Reason is the next field. This allows the user to filter out a particular "planned exit reason" such as "entered unsubsidized employment." Not making a selection (choosing "--Select—") will return all exit reasons.

6. Click the "Report" button to generate the report. The report will display in a separate window on your screen.

Output – Layout:

The parameters or "Report Selection Criteria" are always identified in the Report Header. "Last Service" date is a column along with the "Plan Exit Date" and the "Plan Exit Reason." These last two fields are located on the "Exit Information" screen in TrackOne. That screen should only be completed when the last scheduled service is delivered and the client will likely be exited in 90 days due to no participation.

Planned Exit Client Roster Report

TrackOne

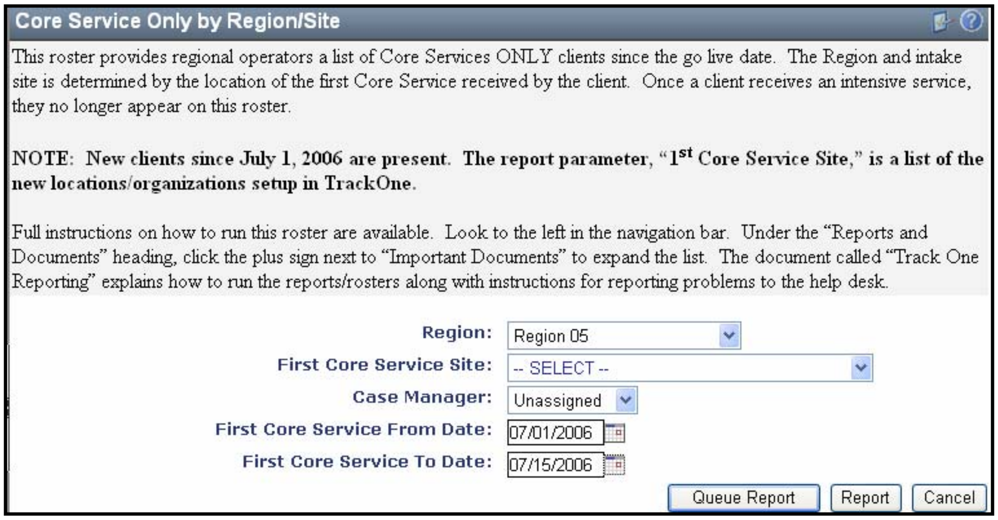
12/27/2006 3:44 PM

Report Selection Criteria

Region: 01	Adult: **N**	NEG: **N**	Dsl Worker: **N**	Planned Exit From Date: **7/1/2006**
Case Manager: **Assigned**	Youth: **Y**	TAA: **N**	Rapid Response: **N**	Planned Exit To Date: **12/21/2006**
App/Intake Site: *				Planned Exit Reason: *

Counter	Region	Organization	Name	SocSecNo	Adult	Dsl Wrkr	Youth	NEG	TAA	RR	Enrl / First Service	Last Service	Plan Exit Date	Plan Exit Reason	Case Managers
1	01	KVWorks - Portage	DOE, ALISHA M	XXX-XX-0296	N	N	Y	N	N	N	03/06/2006	07/10/2006	07/10/2006	Entered Unsubsidized Employment	Sheri Ruge Stephanie Hatfield
2	01	KVWorks - Morroco	DOE, DUSTIN D	XXX-XX-4935	N	N	Y	N	N	N	04/23/2004	07/21/2006	07/21/2006	Entered Unsubsidized Employment	Donna Howell Michelle Ginder
3	01	WDS - East Chicago	DOE, MARIBEL	XXX-XX-7829	N	N	Y	N	N	N	11/30/2004	09/30/2005	08/22/2006	Entered Unsubsidized Employment	Ida Gregory
4	01	WDS - Crown Point	DOE, SAMANTHA A	XXX-XX-7085	N	N	Y	N	N	N	01/10/2006	08/11/2006	08/11/2006	Voluntary, Other	Jennifer Wilson

Core Service Only by Region/Site



Uses: This roster provides regional operators a list of Core Services ONLY clients. The Region and intake site is determined by the location of the first Core Service received by the client. Once a client receives an intensive service, they no longer appear on this roster. The run-time parameters allow for a statewide, regional or a local office view of new and historical clients.

Using the parameters:

1. Decide if you need the report for a region or for a Site:
   a. If you need the report run for a region, begin by selecting the Region from the drop-down list. If the field is left set to "Select," the report will run for ALL regions.
   b. If you want a report for a local service provider, you will use the "Application/Intake Site" pick list. This drop-down is a list of all ***existing*** locations in TrackOne.
   c. **Caution:** Selecting from both the Region and Site could result in a blank report if the site does not fall within the selected region.

2. The Case Manager drop-down is available to allow you to search for clients who are assigned or unassigned in the system. As an example, you could run "Active" in the status drop-down and "unassigned" in the case manager drop-down to see the active clients who came over in the conversion that still need a case manager to be assigned.

3. The next two parameters are used for the First Core Service date range. This allows a service provider or a regional operator to produce a report for all of the First Core Services for the previous month.

Output – Layout:

The parameters or "Report Selection Criteria" are always identified in the Report Header. The location of the 1st Core service is listed along with the staff which recorded the service, the funding stream used, the Last service date and the Official exit date if 90 days have passed since the last service.

Core Service Only by Region/Site

TrackOne 12/27/2006 3:47 PM

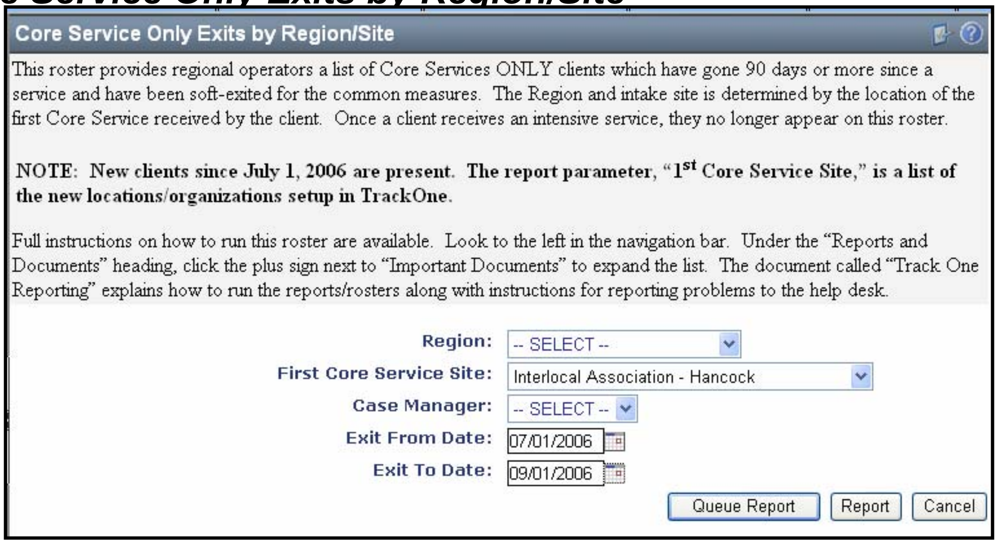
Report Selection Criteria

Region: **05** Case Manager: **Unassigned** First Core Service From Date: **7/1/2006** First Core Service To Date: **7/15/2006**

First Core Service Site: *

Counter	1st Core Service Site	Created By	Name	SocSecNo	Funding Stream	1st Core Service	Last Service	Official Exit Date	Case Managers
1	05 Interlocal Association - Boone	Marcia Kinderman	DOE, Marshall	XXX-XX-5535	WIA-Adult	07/10/2006	07/10/2006	07/10/2006	
2	05 Interlocal Association - Boone	Marcia Kinderman	DOE, Ricky	XXX-XX-5597	WIA-Adult	07/13/2006	07/13/2006	07/13/2006	
3	05 Interlocal Association - Boone	Karen Bray	DOE, Strain	XXX-XX-5623	WIA-Adult	07/07/2006	07/07/2006	07/07/2006	
4	05 Interlocal Association - Johnson	Jan Reese	DOE, Carol	XXX-XX-5514	WIA-Adult	07/11/2006	07/11/2006	07/11/2006	
5	05 Interlocal Association - Johnson	Jan Reese	DOE, Dorothy	XXX-XX-5449	WIA-Adult	07/10/2006	07/10/2006	07/10/2006	
6	05 Interlocal Association - Johnson	Jan Reese	DOE, Joshua	XXX-XX-5520	WIA-Adult	07/11/2006	07/11/2006	07/11/2006	
7	05 Interlocal Association - Johnson	Jan Reese	DOE, Melanie	XXX-XX-5518	WIA-Adult	07/11/2006	07/11/2006	07/11/2006	
8	05 Interlocal Association -	Jan Reese	DOE, Tina	XXX-XX-5502	WIA-Adult	07/10/2006	08/10/2006	08/10/2006	

Core Service Only Exits by Region/Site



Uses: This roster provides regional operators a list of Core Services ONLY clients which have gone 90 days or more since a service and have been soft-exited for the common measures. The Region and intake site is determined by the location of the first Core Service received by the client. Once a client receives an intensive service, they no longer appear on this roster. The run-time parameters allow for a statewide, regional or a local office view of new and historical clients.

Using the parameters:

1. Decide if you need the report for a region or for a Site:
    a. If you need the report run for a region, begin by selecting the Region from the drop-down list. If the field is left set to "Select," the report will run for ALL regions.
    b. If you want a report for a local service provider, you will use the "Application/Intake Site" pick list. This drop-down is a list of all ***existing*** locations in TrackOne.
    c. **Caution:** Selecting from both the Region and Site could result in a blank report if the site does not fall within the selected region.

2. The Case Manager drop-down is available to allow you to search for clients who are assigned or unassigned in the system. As an example, you could run "Active" in the status drop-down and "unassigned" in the case manager drop-down to see the active clients who came over in the conversion that still need a case manager to be assigned.

3. The next two parameters are used for the official exit date for clients who only received core services and there has been 90 days since the last service, which ends their period of participation. This allows a service provider or a regional operator to produce a report for all of the First Core Services which have exited due to no service for 90 days.

Output – Layout:

The parameters or "Report Selection Criteria" are always identified in the Report Header. The location of the 1st Core service is listed along with the staff which recorded the service, the funding stream used, the Last service date and the Official exit date if 90 days have passed since the last service.

Core Service Only Exits by Region/Site

TrackOne 12/27/2006 3:53 PM

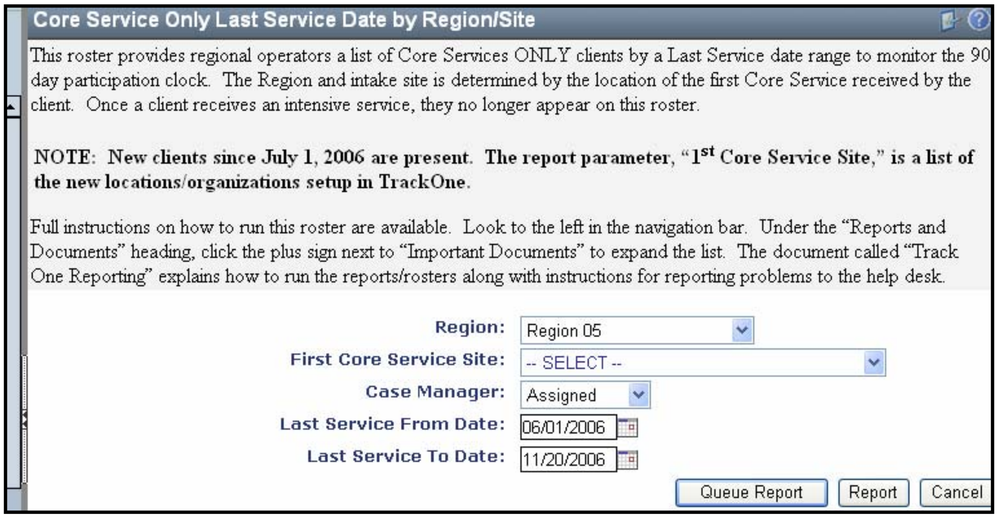
Report Selection Criteria

Region: * Case Manager: * Exit From Date: **7/1/2006** Exit To Date: **9/1/2006**

First Core Service Site: **Interlocal Association - Hancock**

Counter		1st Core Service Site	Created By	Name	SocSecNo	Funding Stream	1st Core Service	Last Servic	Official Exit Date	Case Managers
1	05	Interlocal Association - Hancock	Priscilla Knapp	DOE, Alden	XXX-XX-6156	WIA-Adult	08/16/2006	08/16/2006	08/16/2006	
2	05	Interlocal Association - Hancock	Megan Brinkman	DOE, Alicia	XXX-XX-5626	WIA-Adult	08/11/2006	08/15/2006	08/15/2006	
3	05	Interlocal Association - Hancock	Priscilla Knapp	DOE, Amy	XXX-XX-5857	WIA-Adult	08/16/2006	08/16/2006	08/16/2006	
4	05	Interlocal Association - Hancock	Priscilla Knapp	DOE, Andrea	XXX-XX-5758	WIA-Adult	08/14/2006	08/14/2006	08/14/2006	
5	05	Interlocal Association - Hancock	Megan Brinkman	DOE, Andrea	XXX-XX-5618	WIA-Adult	08/11/2006	08/11/2006	08/11/2006	
6	05	Interlocal Association - Hancock	Priscilla Knapp	DOE, Andrew	XXX-XX-4826	WIA-Adult	08/02/2006	08/02/2006	08/02/2006	
7	05	Interlocal Association - Hancock	Priscilla Knapp	DOE, Andrew	XXX-XX-6838	WIA-Adult	08/31/2006	08/31/2006	08/31/2006	

Core Service Only Last Service Date by Region/Site



Uses: This roster provides regional operators a list of Core Services ONLY clients by a Last Service date range to monitor the 90 day participation clock. The Region and intake site is determined by the location of the first Core Service received by the client. Once a client receives an intensive service, they no longer appear on this roster. The run-time parameters allow for a statewide, regional or a local office view of new and historical clients.

Using the parameters:

1. Decide if you need the report for a region or for a Site:
   a. If you need the report run for a region, begin by selecting the Region from the drop-down list. If the field is left set to "Select," the report will run for ALL regions.
   b. If you want a report for a local service provider, you will use the "Application/Intake Site" pick list. This drop-down is a list of all ***existing*** locations in TrackOne.
   c. **Caution:** Selecting from both the Region and Site could result in a blank report if the site does not fall within the selected region.

2. The Case Manager drop-down is available to allow you to search for clients who are assigned or unassigned in the system. As an example, you could run "Active" in the status drop-down and "unassigned" in the case manager drop-down to see the active clients who came over in the conversion that still need a case manager to be assigned.

3. The next two parameters are used for the "Last Service" date for clients who only received core services. This allows a service provider or a regional operator to produce a report for all of the First Core Services which may be approaching a soft-exit, due to no service for 90 days.

Output – Layout:

The parameters or "Report Selection Criteria" are always identified in the Report Header. The location of the 1st Core service is listed along with the staff which recorded the service, the funding stream used, the Last service date and the Official exit date if 90 days have passed since the last service.

Core Service Only Last Service Date by Region/Site

TrackOne 12/27/2006 4:24 PM

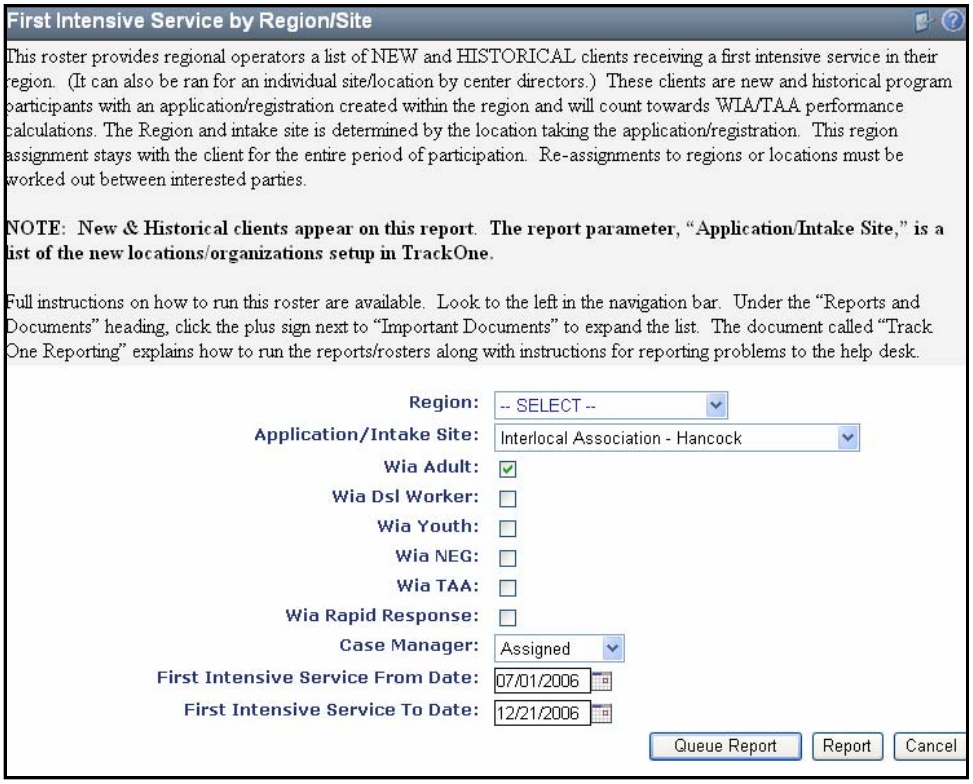
Report Selection Criteria

Region: **05** Case Manager: **Assigned** Last Service From Date: **7/1/2006** Last Service To Date: **11/1/2006**

First Core Service Site: *

Counter	1st Core Service Site	Created By	Name	SocSecNo	Funding Stream	1st Core Service	Last Service	Official Exit Date	Case Managers
1	05 Interlocal Association - Boone	Marcia Kinderman	DOE, MICHAEL D	XXX-XX-0439	WIA-Adult	08/25/2006	08/25/2006	08/25/2006	Rebecca Griffiths
2	05 Interlocal Association - Hamilton	Helen Taylor	DOE, GARY	XXX-XX-2336	WIA-Adult	08/28/2006	08/29/2006	08/29/2006	Linda Stires
3	05 Interlocal Association - Hamilton	Helen Taylor	DOE, JOHN L	XXX-XX-7675	WIA-Adult	08/28/2006	08/28/2006	08/28/2006	Julie Mathews

First Intensive Service by Region/Site



Uses: This roster provides regional operators a list of NEW and HISTORICAL clients receiving a first intensive service in their region. (It can also be run for an individual site/location by center directors.) These clients are new and historical program participants with an application/registration created within the region and will count towards WIA/TAA performance calculations. The Region and intake site is determined by the location taking the application/registration. This region assignment stays with the client for the entire period of participation. Re-assignments to regions or locations must be worked out between interested parties.

Using the parameters:

1. Decide if you need the report for a region or for a Site:
   a. If you need the report run for a region, begin by selecting the Region from the drop-down list. If the field is left set to "Select," the report will run for ALL regions.
   b. If you want a report for a local service provider, you will use the "Application/Intake Site" pick list. This drop-down is a list of all ***existing*** locations in TrackOne.
   c. **Caution:** Selecting from both the Region and Site could result in a blank report if the site does not fall within the selected region.

2. The next 6 selections represent program participation within the region. If you leave all boxes blank, you will run the report for all programs. If a single program is selected, then all clients enrolled in that program will appear on the report. If the client is also enrolled in other programs then they will also appear. If 2 or more programs are selected, then the roster will only return those clients with all programs.

Here's an example. You have client John Doe in the WIA Adult program. Jane Jones is enrolled in WIA DSL Worker. Maria Sanchez is dual-enrolled in WIA Adult and WIA DSL Worker.

You run the report and check the box for WIA Adult. John Doe and Maria Sanchez would show up on the report. If WIA DSL Worker is selected, then Jane Jones and Maria Sanchez will show up on the report. Conversely, if you checked both WIA Adult and WIA DSL worker, only Maria Sanchez would show up (and not John Doe or Jane Jones).

3. The Case Manager drop-down is available to allow you to search for clients who are assigned or unassigned in the system. As an example, you could run "Active" in the status drop-down and "unassigned" in the case manager drop-down to see the active clients who came over in the conversion that still need a case manager to be assigned.

4. The "First Intensive Service From Date" and the "First Intensive Service To Date" is the date range for the first intensive service (which moves the client into the WIA Performance calculations).

5. Click the "Report" button to generate the report. The report will display in a separate window on your screen.

Output – Layout:

The parameters or "Report Selection Criteria" are always identified in the Report Header. The "Enrl / First Service" and the "Last Service Date" are columns on the report.

First Intensive Service by Region/Site

TrackOne

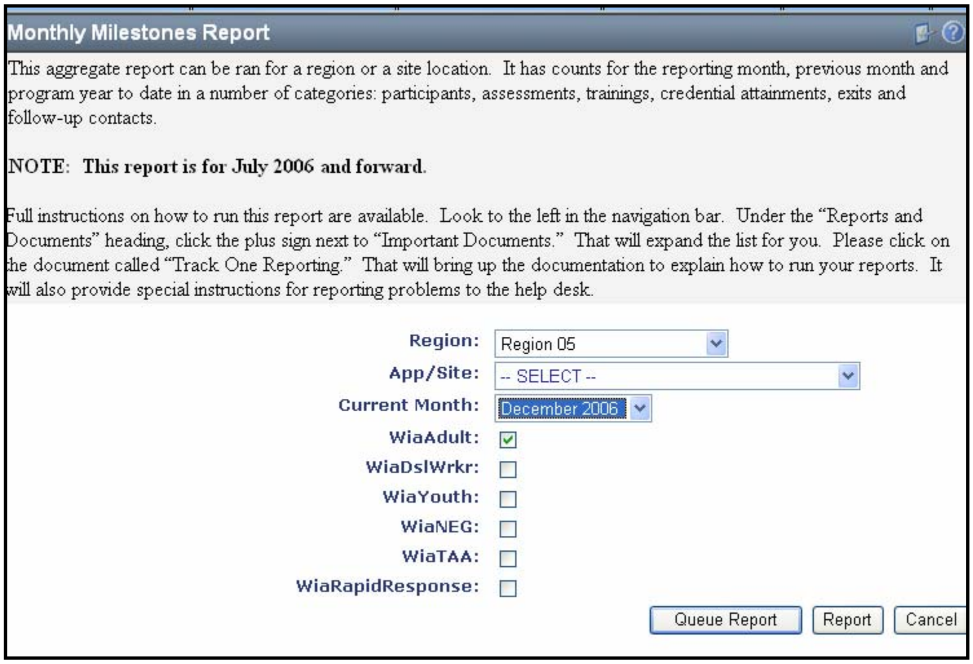
12/27/2006 4:34 PM

Report Selection Criteria

Region:	*	Adult:	**Y**	NEG:	**N**	1st Intensive Service From Date:	**7/1/2006**
Application/Reg Site:	Interlocal Association	Youth:	**N**	TAA:	**N**	1st Intensive Service To Date:	**12/21/2006**
Case Manager:	**Assigned**			Dsl Worker:	**N**	Rapid Response:	**N**

Counter	Region	App/Reg Site	Name	SocSecNo	Adult	Dsl Wrkr	Youth	NEG	TAA	RR	Enrl / First Service	Last Service Date	Case Managers
1	05	Interlocal Association - Hancock	Baker, John	XXX-XX-1234	Y	N	N	N	N	N	11/02/2006	11/17/2006	Kevin Gibbs
2	05	Interlocal Association - Hancock	DOE, David J	XXX-XX-4535	Y	Y	N	N	N	N	07/28/2006	08/24/2006	Megan Brinkman
3	05	Interlocal Association - Hancock	DOE, Judy A	XXX-XX-5897	Y	N	N	N	N	N	08/25/2006	08/25/2006	Megan Brinkman
4	05	Interlocal Association - Hancock	DOE, Kimberly	XXX-XX-6508	Y	N	N	N	N	N	08/22/2006	08/22/2006	Megan Brinkman
5	05	Interlocal Association - Hancock	DOE, Mary Ann	XXX-XX-6712	Y	N	N	N	N	N	08/28/2006	08/28/2006	Megan Brinkman

Monthly Milestones Report



Uses: This aggregate report can be run for a region or a site location. It has counts for the reporting month, previous month and program year to date in a number of categories: participants, assessments, trainings, credential attainments, exits and follow-up contacts.
NOTE: This report is for July 2006 and forward.

Using the parameters:

1. Decide if you need the report for a region or for a Site:
   a. If you need the report run for a region, begin by selecting the Region from the drop-down list. If the field is left set to "Select," the report will run for ALL regions.
   b. If you want a report for a local service provider, you will use the "Application/Intake Site" pick list. This drop-down is a list of all ***existing*** locations in TrackOne.
   c. **Caution:** Selecting from both the Region and Site could result in a blank report if the site does not fall within the selected region.

2. Current Month – The pick list has each month from July 2006 forward. The report will show the selected months aggregate counts along with the previous month and the program to date counts.

3. The next 6 selections represent program participation within the region. If you leave all boxes blank, you will run the report for all programs. If a single program is selected, then all clients enrolled in that program will appear on the report. If the client is also enrolled in other programs then they will also appear. If 2 or more programs are selected, then the roster will only return those clients with all programs.

Here's an example. You have client John Doe in the WIA Adult program. Jane Jones is enrolled in WIA DSL Worker. Maria Sanchez is dual-enrolled in WIA Adult and WIA DSL Worker.

You run the report and check the box for WIA Adult. John Doe and Maria Sanchez would show up on the report. If WIA DSL Worker is selected, then Jane Jones and Maria Sanchez will show up on the report. Conversely, if you checked both WIA Adult and WIA DSL worker, only Maria Sanchez would show up (and not John Doe or Jane Jones).

4. Click the "Report" button to generate the report. The report will display in a separate window on your screen.

Output – Layout:

Monthly Milestones Report

The parameters or "Report Selection Criteria" are always identified in the Report Header. The report has aggregate counts for participants, assessments, training, credential attainment, exits and follow-up contacts.

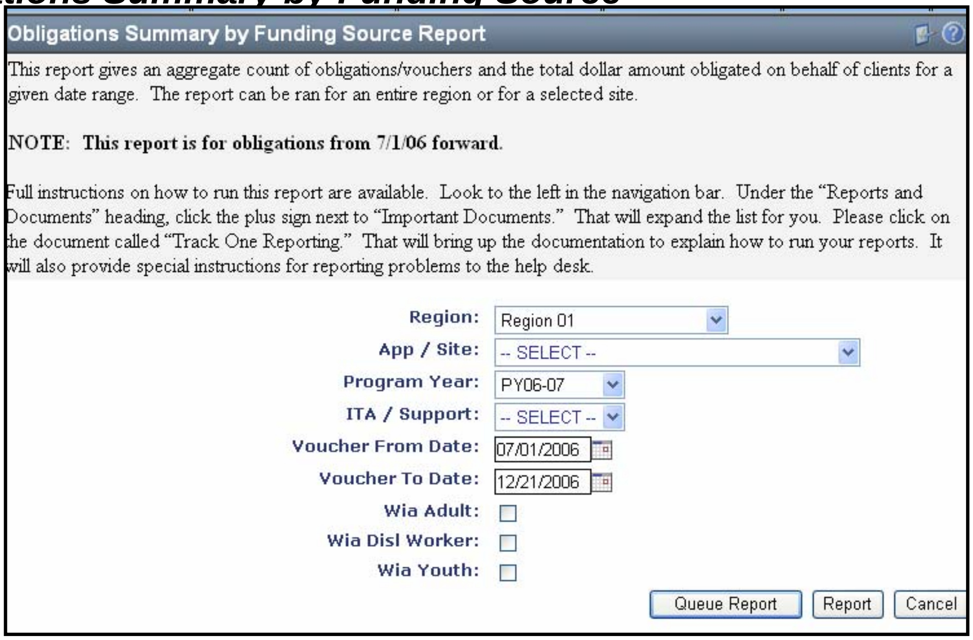
Monthly Milestone
12/27/2006 4:38 PM

Report Selection Criteria

Region: 05 Current Month: 12/2006 Adult: Y NEG: N Dsl Worker: N
Application/Reg Site: * Youth: N TAA: N Rapid Response: N

	Current Month	Previous Month	Program Year To Date
Participants			
Core Services Only	0	0	502
New First Intensive Registrants	1	2	44
Active Registrants	49	48	157
Assessments			
Assements Given/ Recorded	0	0	11
Training			
First Service	0	1	15
New Starts	0	0	50
Active	84	84	147
Completions	0	0	3
Credential Attainment			
HS Diploma	0	0	0
GED	0	0	0
AA	0	0	2
BA	0	0	0
Licenses / Certificates	0	0	7
Exits			
Planned Exits	1	0	28
Employed at Exit	1	0	22
Average Hourly Wage	$26.00		$16.76
Actual Exits	0	0	108
Follow-Ups			
Contacts Made	0	0	28
Employed at Contact	0	0	17

Obligations Summary by Funding Source



Obligations Summary by Funding Source Report

This report gives an aggregate count of obligations/vouchers and the total dollar amount obligated on behalf of clients for a given date range. The report can be ran for an entire region or for a selected site.

NOTE: **This report is for obligations from 7/1/06 forward.**

Full instructions on how to run this report are available. Look to the left in the navigation bar. Under the "Reports and Documents" heading, click the plus sign next to "Important Documents." That will expand the list for you. Please click on the document called "Track One Reporting." That will bring up the documentation to explain how to run your reports. It will also provide special instructions for reporting problems to the help desk.

Region: Region 01
App / Site: -- SELECT --
Program Year: PY06-07
ITA / Support: -- SELECT --
Voucher From Date: 07/01/2006
Voucher To Date: 12/21/2006
Wia Adult:
Wia Disl Worker:
Wia Youth:

Queue Report | Report | Cancel

Uses: This report gives an aggregate count of obligations/vouchers and the total dollar amount obligated on behalf of clients for a given date range. The report can be run for an entire region or for a selected site.

Using the parameters:

1. Decide if you need the report for a region or for a Site:
   If you need the report run for a region, begin by selecting the Region from the drop-down list. If the field is left set to "Select," the report will run for ALL regions.
   If you want a report for a local service provider, you will use the "Application/Intake Site" pick list. This drop-down is a list of all ***existing*** locations in TrackOne.
   Caution: Selecting from both the Region and Site could result in a blank report if the site does not fall within the selected region.

2. Program Year – The only selection at this time is for the current program year July 2006 to June 2007

3. ITA/Support allows the user to select whether to see just ITA accounts, just Support accounts or to see both by leaving the default "Select."

4. The voucher from and to date allows the user to filter the report for obligations/vouchers generated during a given period of time.

5. The next 3 selections represent program and will return the totals for the selected programs.

6. Click the “Report” button to generate the report. The report will display in a separate window on your screen.

Output – Layout:

At the present time the only part of the obligations process tracked is the creation of the obligation or the voucher. These appear in the Pending voucher count and the Pending Voucher Total columns. The “approved” and “denied” status are not currently tracked in the system so those columns will be “0 & $0.00” at this time.

Obligations Summary by Funding Source

TrackOne

Obligations Summary by Funding Source

12/27/2006 4:45 PM

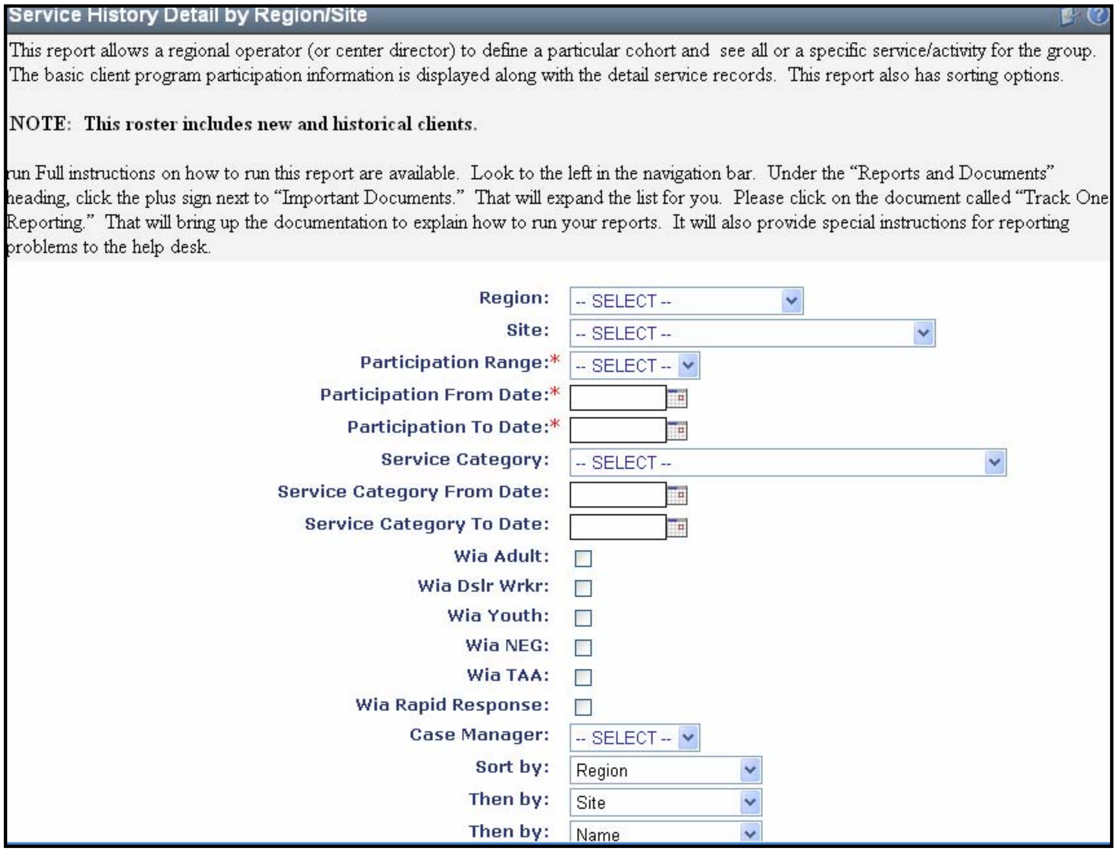
Report Selection Criteria

Region: **01** Program Year: **PY06-07** ITA/Support: ***** Adult: **N** Youth: **N** Dsl Worker: **N**

Application/Reg Site: ***** Voucher From Date: **7/1/2006** Voucher To Date: **12/21/20**

Program	ITA / Support	Program Year	Pending Voucher Count	Pending Voucher Total	Approved Voucher Count	Approved Voucher Total	Denied Voucher Count	Denied Voucher Total	Total Voucher Count	Total Voucher Total
WIA-Adult	ITA	PY06-07	1	$276.76	0	$0.00	0	$0.00	1	$276.76
WIA-Adult	Support	PY06-07	10	$2,503.41	0	$0.00	0	$0.00	10	$2,503.41
Program Total			11	$2,780.17	0	$0.00	0	$0.00	11	$2,780.17
WIA-DislWrkr	ITA	PY06-07	2	$1,096.40	0	$0.00	0	$0.00	2	$1,096.40
WIA-DislWrkr	Support	PY06-07	11	$1,145.98	0	$0.00	0	$0.00	11	$1,145.98
Program Total			13	$2,242.38	0	$0.00	0	$0.00	13	$2,242.38
Total			24	$5,022.55	0	$0.00	0	$0.00	24	$5,022.55

Service History Detail by Region/Site



Uses: This report allows a regional operator (or center director) to define a particular cohort and see all or a specific service/activity for the group. The basic client program participation information is displayed along with the detail service records. This report also has sorting options. The run-time parameters allow for a statewide, regional or a local office view of new and historical clients.

Using the parameters:

1. Decide if you need the report for a region or for a Site:
   a. If you need the report run for a region, begin by selecting the Region from the drop-down list. If the field is left set to "Select," the report will run for ALL regions.
   b. If you want a report for a local service provider, you will use the "Application/Intake Site" pick list. This drop-down is a list of all ***existing*** locations in TrackOne.
   c. **Caution:** Selecting from both the Region and Site could result in a blank report if the site does not fall within the selected region.

2. The "Participation Range:" parameter allows the user to define whether the cohort (target group) is "Active, Exited or New Starts." The "Active" parameter will return any client which was "active" at least 1 day during the date range. The "Exited" parameter returns any client which has an "official Exit date during the date range. The "New Starts" parameter returns any client with a 1st service date which falls within the date range.

3. The “Participation From Date” and “Participation To Date” is the date range for the selected participation type above. If “Active” is selected then the date range is for any client which was active at least 1 day during the range. If “Exited” is selected then the date range is for the official exit date.

4. The “Service Category” allows the user to select a specific service category and only those service records for the client will appear on the report. If “Select” is left as the choice then all service records for the client will be displayed on the report. This parameter can be used to return only the occupational skills training services or the supportive services.

5. The “Service Category From Date” and the “Service Category To Date” is the date range for the selected service category. This parameter can be very useful as it can filter the Occupational Skills Training services which were active at least 1 day during the months of Oct. to Nov.

6. The next 6 selections represent program participation within the region. If you leave all boxes blank, you will run the report for all programs. If a single program is selected, then all clients enrolled in that program will appear on the report. If the client is also enrolled in other programs then they will also appear. If 2 or more programs are selected, then the roster will only return those clients with all programs.

   Here’s an example. You have client John Doe in the WIA Adult program. Jane Jones is enrolled in WIA DSL Worker. Maria Sanchez is dual-enrolled in WIA Adult and WIA DSL Worker.

   You run the report and check the box for WIA Adult. John Doe and Maria Sanchez would show up on the report. If WIA DSL Worker is selected, then Jane Jones and Maria Sanchez will show up on the report. Conversely, if you checked both WIA Adult and WIA DSL worker, only Maria Sanchez would show up (and not John Doe or Jane Jones).

7. The Case Manager drop-down is available to allow you to search for clients who are assigned or unassigned in the system. As an example, you could run “Active” in the status drop-down and “unassigned” in the case manager drop-down to see the active clients who came over in the conversion that still need a case manager to be assigned.

8. The next three parameters allow the user to select how the results will be sorted. The defaults can be left as is if there is no preference.

9. Click the “Report” button to generate the report. The report will display in a separate window on your screen.

Output – Layout:

The parameters or “Report Selection Criteria” are always identified in the Report Header. The Service History Detail has three sections for each client. The 1st is the row which identifies the client by name and SSN. The 2nd row defines the period of participation, the program involvement and the major milestone dates. The 3rd is the services detail section where each service is listed along with dates, status, funding stream and organization recording the service.

Note: Historical service records ***do*** appear on the report; however they ***will not*** have a Service title. They ***will*** have the old code. New services, since go-live, will have a descriptive title in the “Service Title” column.

Service History Detail by Region/Site

TrackOne

12/27/2006 4:53 PM

Report Selection Criteria

Region:	*	Adult:	**Y**	NEG:	**N**	Participation From Date:	**7/1/2006**	Sorted By:	**Region**
Application/Reg Site:	Interlocal Association	Youth:	**N**	TAA:	**N**	Participation To Date:	**12/21/2006**	Then By:	**Site**
Participation Range:	**New Start**			Dsl Worker:	**N**	Service Category From Date:	**7/1/2006**	Then By:	**Name**
Service Category:	**Informational/Self-Service**			RR:	**N**	Service Category To Date:	**12/1/2006**	Case Manager:	*

Name	SocSecNo
DOE, David J	XXX-XX-4535

The Client is identified.

Counter	Region	App/Reg Site	Adult	Dsl Wrk	Youth	NEG	TAA	RR	Enrl / First Service	Last Service Date	Planned Exit Date	Planned Exit R
1	05	Interlocal Association - Hancock	Y	Y	N	N	N	N	07/28/2006	08/24/2006		

Program participation & milestone dates.

Start Date	Service Title	Code	Planned End Date	Status	Actual End Date	Funding Stream	Org. Recording Service
08/15/2006	Self-help - Job Search - Generic	C9	08/15/2006	Completed	08/15/2006	WIA-Adult	Interlocal Association - Hancock
08/16/2006	Self-help - Job Search - Generic	C9	08/16/2006	Completed	08/16/2006	WIA-Adult	Interlocal Association - Hancock
08/18/2006	Self-help - Job Search - Generic	C9	08/18/2006	Completed	08/18/2006	WIA-Adult	Interlocal Association - Hancock
08/21/2006	Self-help - Job Search - Generic	C9	08/21/2006	Completed	08/21/2006	WIA-Adult	Interlocal Association -

Services for client.

Reporting Problems to the Help Desk

When to call

The help desk is available to assist with problems related to your reports. There are two possible types of problems you will experience with reporting. The first is actually getting the report to run. The second is a problem with the data after the report runs. We're asking for your help. In order to control the volume of calls, we'd like you to call anytime you are having problems actually getting the report to run. We will log your call, and walk you through the steps to get the report to work.

When to send an email

If you have a problem with the data in your report (i.e., "these numbers don't look right), and you want to have the data investigated, we're requesting that you document that in an email. Please send the email to support@atworksolutionsinc.com with the following information:

1. Include the words "Report problem" in the subject line.
2. In the text of the email, tell us which report you were running and how you had the parameters set.
3. If possible, describe exactly what data "doesn't look right" and why you think there may be a data issue.
4. Finally, be sure to include your name, phone number and email address so we can contact you if we have questions while researching your problem.

These issues will be sent to our technical team for review. We will respond to you as quickly as possible with a resolution.